

Informatica[®] Cloud Application Integration November 2023

Salesforce and Application Integration

Informatica Cloud Application Integration Salesforce and Application Integration November 2023

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Preface

Use *Salesforce and Application Integration* to learn how to install the Salesforce Managed Package and run a guide within a Salesforce organization.

CHAPTER 1

Salesforce Managed Package

This chapter includes the following topics:

- Salesforce Managed Package Overview, 6
- Salesforce managed package URLs, 6
- Installing the Salesforce Managed Package, 7
- Upgrading the Salesforce Managed Package, 12
- Uninstalling and Deleting the Salesforce Managed Package, 14
- More Information, 15

Salesforce Managed Package Overview

You can use the Informatica Cloud Real Time for Salesforce package to:

- Integrate Application Integration with Salesforce.
- Test and publish a Salesforce connection in Application Integration to fetch the metadata from Salesforce.
- Work with Salesforce objects when you run a process.
- Work with Salesforce guides.
- Access Application Integration and Salesforce resources with a single sign-on.
- Use a Salesforce outbound message (OBM) that triggers an Application Integration process. For more information, see the Salesforce Outbound Messages topic in the System Services, Listeners and Connectors section of the Design guide.

Salesforce managed package URLs

The Salesforce managed package for Informatica Cloud Real Time version 1.26 uses version 56.0 of the Salesforce API.

You can install or upgrade to the latest managed package version 1.26.

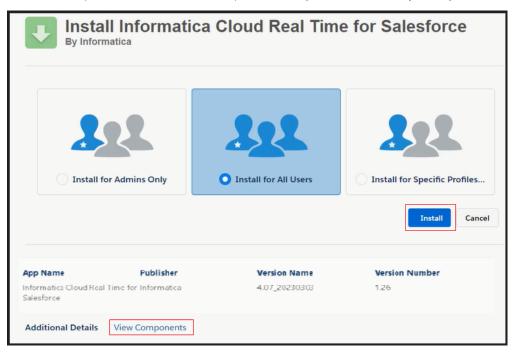
Log in to the following URLs to install or upgrade to the latest managed package:

 To install the latest version 1.26, use the following URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk To install the latest sandbox version, use the following URL: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk

Installing the Salesforce Managed Package

Before you install the Salesforce managed package, make sure that your organization meets the following prerequisites:

- Your organization uses the Unlimited, Enterprise, Professional, or Developer edition of Salesforce. However, when you use the trial version which is the Professional edition of Salesforce, you might not be able to configure the managed package or connect to Salesforce. This happens because the API Enabled option is not available for the trial organizations. Informatica recommends that you use the Unlimited, Enterprise, or Developer edition of Salesforce.
- Salesforce APIs are enabled.
- You have administrative rights in the Salesforce organization where you want to install the managed package.
- 1. Depending on your business need, log in to your production or sandbox Salesforce developer account.
 - Production: <u>https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk</u>
 - Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk
- Enter your Salesforce developer account user credentials.
 On the Install Informatica Cloud Real Time for Salesforce page, select one of the following options:
 - Install for Admins Only. Select this option to allow only admin users in Salesforce to run guides.
 - Install for All Users. Select this option to allow all users in Salesforce to run guides on the objects they work with. Most organizations grant access to all users.
 - Install for Specific Profiles. Select this option to configure custom security settings.



3. Optionally, click View Components to see detailed components of the managed package.

| | | Package Compo | nents | | |
|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| Create | Run On Info | Guide_Executionc | Custom Field | This is a brand new component. | |
| Create | Use Connected App | AeCloudExtendSettingsc | Custom Field | This is a brand new component. | |
| Create | User | Guide_Milestonec | Custom Field | This is a brand new component. | |
| Create | Description | Guide_Definitionc | Custom Field | This is a brand new component. | |
| Create | Guide Design | Guide_Definitionc | Custom Field | This is a brand new component. | |
| Create | Starting User | Guide_Executionc | Custom Field | This is a brand new component. | |
| Create | Run On Type | Guide_Executionc | Custom Field | This is a brand new component. | |
| Create | Ending User | Guide_Executionc | Custom Field | This is a brand new component. | |
| Create | Run On | Guide_Milestonec | Custom Field | This is a brand new component. | |
| Create | Guide Execution | Guide_Milestonec | Custom Field | This is a brand new component. | |
| Create | Guide Name | Activity | Custom Field | This is a brand new component. | |
| Create | Run On Type | Guide_Milestonec | Custom Field | This is a brand new component. | |
| | | | | | |
| Create | Time | Guide_Milestonec | Custom Field | This is a brand new component. | |
| Create | Time | Guide_Milestonec | Custom Field | This is a brand new component. | |
| | Time Component Name | | | This is a brand new component. | _ |
| Create Resources (18) Action | Component Name | Guide_MilestoneC Parent Object | Component Type | Installation Notes | _ |
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| Create | Component Name Home Guides Guide Ministros Layout Guide Exections Ad Guide Exections due to the Component Ad Michiel StaticResources Guide Reports | Parent Object Guide_Milettone_6 | Component Type Hone Fugic Component Page Lyout Custom Resort Type Document Document Static Resource Hone Fugic Component Report Folder | Installation Notes This is a bread new component. | |
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| Create | Component Name Home Guides Guide Matterbei Layout Guide Exections Aufühlenspag proj ce-64 Aufühle/StatcResources Guide Reports Guide Reports Guide Reports | Parent Object Guide_Milettone_6 | Composent Type Hone Page Component Page Layout Couton Report Type Document Document Document Batic Resource Hone Page Component Report Folder Page Layout | Installation Notes This is a brain direk component. | |

4. Click Install.

5. Click **Done** after the install is complete.

If the installation takes a long time, a message appears stating that you will receive an email when the installation is complete. Click **Done**.

| By Infor | all Informatic | a Clou | d Real | Time f | or Sa | ale | sfo | orce |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|---------------------|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| | s app is taking a long t will receive an email after | | | eted. | | | | |
| | | | | | | | | Done |
| App Name | Publisher | | Versi | on Name | | , | /ersi (| on Number |
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| | | | | | | | | Help for this Page |
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| AppExthange you can bravers, lest drive, download ops and components we institute in sackages, Anyr ong the other features in extual or as a group by citils ending on the lines meth an installed package, you remove a package, citik Uthinstall. To manage you installed Packages Action Package Innet Umstall & Balastoric Constitutes Package Description | cestom apps, tabe, and custom objects are initially marked of ing Dealor, or us make different actions from this page. • package licenses, click Manage Licenses. • Publisher Informatics Corp | Version Number 5.15 1.7 | ot deployed to your users. This Namespace Prefix Informatica sf_corm_apps | illows you to test and customize Install Date 0205/2019 21:22 | Limits | Apps 1 | Tabs 1 | Objects AppExchange Ready 0 Passed |
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Installed Packages page appears with the managed package under Installed Packages.

6. Click **All Tabs** at the top of the page.



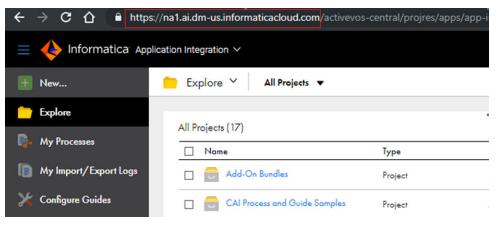
7. On the All Tabs page, click Guide Setup.

8. On the Registration Verification page, enter the Informatica Cloud Real Time Host URL.

To construct the Informatica Cloud Real Time Host URL, you will need the following values:

Cloud Application Integration URL

Log in to Informatica Intelligent Cloud Services[™] and select the **Application Integration** service. The URL portion that is highlighted in the following image is your Cloud Application Integration URL:



POD-specific Cloud Application URL

Use the POD-specific Cloud Application URL for Salesforce instead of the Cloud Application Integration URL. Otherwise, when you access Application Integration and the Salesforce organization linked to Application Integration simultaneously on two different browser tabs, you might encounter issues while publishing Application Integration assets.

Determine your POD-specific Cloud Application URL for Salesforce based on your POD and Cloud Application Integration URL. The following table lists the POD-specific Cloud Application URL for Salesforce that is applicable for various PODs and Cloud Application Integration URLs:

| POD Name | Cloud Application Integration URL | POD-specific Cloud Application URL for Salesforce | | |
|----------------|-----------------------------------------------------|----------------------------------------------------------|--|--|
| AP NorthEast 2 | https://apne2-cai.dm- apne.informaticacloud.com | https://apne2-sfdc-cai.dm- apne.informaticacloud.com | | |
| APJ/APSE1 | https://apsel-cai.dm- ap.informaticacloud.com | https://apsel-sfdc-cai.dm- ap.informaticacloud.com | | |
| AZ GERMANY | https://emc1-cai.dm1- em.informaticacloud.com | https://emcl-sfdc-cai.dml- em.informaticacloud.com | | |
| AZ SINGAPORE | https://apsel-cai.dml- apse.informaticacloud.com | https://apsel-sfdc-cai.dml- apse.informaticacloud.com | | |
| AZURE NTT | https://apnel-cai.dml- ap.informaticacloud.com | https://apnel-sfdc-cai.dml- ap.informaticacloud.com | | |
| AZURE POD1 | https://usw1-cai.dm1- us.informaticacloud.com | https://usw1-sfdc-cai.dm1- us.informaticacloud.com | | |

| POD Name | Cloud Application Integration URL | POD-specific Cloud Application URL for Salesforce | |
|---------------------|-----------------------------------------------------|----------------------------------------------------------|--|
| AZURE POD3 | https://usw3-cai.dm1- us.informaticacloud.com | https://usw3-sfdc-cai.dm1- us.informaticacloud.com | |
| C360-Preview | https://uswl-cai.dmp- us.informaticacloud.com | https://uswl-sfdc-cai.dmp- us.informaticacloud.com | |
| CANADA | https://nacl-cai.dm- na.informaticacloud.com | https://nacl-sfdc-cai.dm- na.informaticacloud.com | |
| EMW1 | https://emwl-cai.dm- em.informaticacloud.com | https://emwl-sfdc-cai.dm- em.informaticacloud.com | |
| GCP | https://uswl-cai.dm2- us.informaticacloud.com | https://uswl-sfdc-cai.dm2- us.informaticacloud.com | |
| POD1/ USW1/NA1 | https://nal.ai.dm- us.informaticacloud.com | https://nal.sfdc-ai.dm- us.informaticacloud.com | |
| POD2/NA2 | https://na2.ai.dm- us.informaticacloud.com | https://na2.sfdc-ai.dm- us.informaticacloud.com | |
| POD3/USW3 | https://usw3-cai.dm- us.informaticacloud.com | https://usw3-sfdc-cai.dm- us.informaticacloud.com | |
| POD4/USE4 | https://use4-cai.dm- us.informaticacloud.com | https://use4-sfdc-cai.dm- us.informaticacloud.com | |
| POD5/USW5 | https://usw5-cai.dm- us.informaticacloud.com | https://usw5-sfdc-cai.dm- us.informaticacloud.com | |
| POD6/USE6 | https://use6-cai.dm- us.informaticacloud.com | https://use6-sfdc-cai.dm- us.informaticacloud.com | |
| PREVIEW | https://usw1-cai.dmr- us.informaticacloud.com | https://usw1-sfdc-cai.dmr- us.informaticacloud.com | |
| UAE (Azure EMSE) | https://emsel-cai.dml- emse.informaticacloud.com | https://emsel-sfdc-cai.dml- emse.informaticacloud.com | |
| UK1 | https://ukl-cai.dm- uk.informaticacloud.com | https://ukl-sfdc-cai.dm- uk.informaticacloud.com | |

Organization ID

To view your Informatica Organization ID, log in to Informatica Intelligent Cloud Services and copy the Organization ID from **Organization** list shown in the following image:

| Informatico | a Business Solutions PVT Ltd 🗸 🔶 📍 🧟 📍 |
|-------------|--------------------------------------------------|
| | Org Name: Informatica Business Solutions PVT Ltd |
| | Org Id: 5p2CFQ2gzDsdkV1rghsBGw |

Alternatively, you can select the **Administrator** service and then click **Organization**. Copy the Informatica Organization ID displayed in the **ID** field as shown in the following image:

| = 🔶 Informatica Administrator ~ | | | | | | | |
|---------------------------------|-------------------------------------------------------|----------------------------------------|----|--|--|--|--|
| 🔒 Organization | Organization 🔒 Informatica Business Solutions PVT Ltd | | | | | | |
| 🔇 SAML Setup | SAML Setup Sub-Organizations | | | | | | |
| 🌄 Licenses | Overview | | | | | | |
| Users | Name:* | Informatica Business Solutions PVT Ltd | | | | | |
| 🔱 User Groups | ID: | 5p2CFQ2gzDsdkV1rghs8Gw | | | | | |
| User Roles | Environment Type: | Production | - | | | | |
| Runtime Environments | Description: | | | | | | |
| Connections | | | 12 | | | | |
| 🖉 Add-On Connectors | Number of Employees: | Fewer than 10 employees | - | | | | |
| 🛐 Schedules | | | | | | | |
| 🧼 Add-On Bundles | History | | | | | | |
| Swagger Files | Created By: | ma | | | | | |
| 🔂 logs | Created On: | Dec 2; 2018, 9:06 PM | | | | | |

Construct the Informatica Cloud Application Integration Host URL by using the following format:

<POD-specific Cloud Application URL for Salesforce>,<Informatica Organization ID>

Enter the URL in the **ICAI Host URL** field.

For example, enter https://nal.sfdc-ai.dm-us.informaticacloud.com,5p2CFQ2gzDsdkVlrghsBGw as shown in the following image:

| Informatica Cloud Application Integration for Sale Verification | sforce Registration Verify |
|--------------------------------------------------------------------|--------------------------------------------------------------------------|
| Please enter the Information | a Cloud Application Integration Host information supplied by Informatica |
| ICAI Host URL | https://na1.sfdc-ai.dm-us.informaticacloud.com,5p2CFQ2gzDsdkV |
| | Verify |
| | |

9. Click Verify.

The Informatica Cloud Services Authorization page appears.

Note: If your Informatica Intelligent Cloud Services organization was previously linked to another Salesforce organization, a warning message appears as shown in the following image:

| Warn | Warning: Organization ID change confirmation | | | | |
|------|----------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|
| | A different Salesforce organization associated with the target ICRT host URL is already in use. | | | | |
| | If you confirm this login operation you will change the organization for the target tenant. Are you sure that you want to continue? | | | | |
| | | | | | |
| | Confirm Cancel | | | | |

You can change the linked Salesforce organization when you install a managed package. For example, you have completed steps 1 through 8 to install the managed package in Salesforce organization A. However, your Informatica Intelligent Cloud Services organization B is already linked to a Salesforce organization C. If you click **Confirm** on the warning message, you link Informatica Intelligent Cloud Services organization A.

10. Enter your Informatica Intelligent Cloud Services administrator credentials and then click Log In.

| Guide 5 | and b | | |
|---------|------------------|-----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | |
| Info | rmatica Clo | d Services Authorization | |
| Pleas | e provide ICS ac | lministrative credentials for your organizati | ion to link this Salesforce Organization to the Informatics Cloud Organization "eNIIdGHTU8YIkZEaaqNVY69". Note: Only one Salesforce Organization can be linked to an Informatica Organization for Guide Execution. |
| Usen | iame: | sonia.staging1 | |
| Passi | vord: | | |
| | | Log In | |

A confirmation message appears as shown in the following image stating that your Salesforce organization has been configured:

Guide Setup

Your Salesforce org has been configured for Informatica CAI. Click on Advanced settings to change the configuration.

Upgrading the Salesforce Managed Package

Perform the following steps to upgrade the Salesforce managed package:

- 1. Depending on your business need, log in to your production or sandbox Salesforce developer account.
 - Production: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk
 - Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk
- Enter your Salesforce developer account user credentials.
 On the Upgrade Informatica Cloud Real Time for Salesforce page, select one of the following options:
 - Install for Admins Only. Select this option to allow only admin users in Salesforce to run guides.
 - Install for All Users. Select this option to allow all users in Salesforce to run guides on the objects they work with. Most organizations grant access to all users.

• Install for Specific Profiles. Select this option to configure custom security settings.

| | rade Informati | ca Cloud Real Ti | me for Salesforce |
|------------------------------------|------------------------------------------------------------|---------------------------------------------------------------|----------------------------------------------------------------|
| | earlier version is installe alled: 4.05_20190909 (1.25) | d. It can be upgraded while p New Version: 4.07_20230303 (| |
| Install for | Admins Only | Install for All Users | Install for Specific Profiles |
| You're ins Partner Pr | | ation that is not authorized for distribu | ution as part of Salesforce's AppExchange |
| I acknowledge tha Program. | at l'm installing a Non-Salesforce Apj | olication that is not authorized for distribut | ion as part of Salesforce's AppExchange Partner Upgrade Cancel |
| App Name | Publisher | Version Name | Version Number |
| Informatica Cloud Re Salesforce | al Time for Informatica | 4.07_20230303 | 1.26 |
| Additional Details | View Components | | |

3. Optionally, click View Components to see the detailed components of the managed package.

| kage Components | | | | |
|-----------------|-------------------------------------------------------------------|-------------------|-----------------------|-----------------------------------------------------------------------|
| Pages (18) | | | | |
| Action | Component Name | Parent Object | Component Type | Installation Notes |
| Update | Guide Setup | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Informatica Cloud Application Integration Advance | ed Options | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Sales Guide Launcher | | Visualforce Component | This is an upgraded component. It will be updated to the new version. |
| Update | Escape vCard String | | Visualforce Component | This is an upgraded component. It will be updated to the new version. |
| Update | Guides Listing | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Task Sales Guides | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Mobile Task Sales Guides | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Sales Guides | | Visualforce Component | This is an upgraded component. It will be updated to the new version. |
| Update | Guide Items Listing - Internal | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Guides Listing | | Visualforce Component | This is an upgraded component. It will be updated to the new version. |
| Update | Mobile Web Application | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | AeGuideDefinitionDelete | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Guide API | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Guide List | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Provisioning Guides | | Visualforce Component | This is an upgraded component. It will be updated to the new version. |
| Update | Guide Designer | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Execution Log Launcher | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| Update | Mobile Guide Viewer | | Visualforce Page | This is an upgraded component. It will be updated to the new version. |
| | | | | |
| Apps (3) | | | | |
| Action | Component Name | Parent Object | Component Type | Installation Notes |
| Update | Informatica Cloud Application Integration Packag Connected App | pe for Salesforce | Connected App | This is an upgraded component. It will be updated to the new version. |
| Update | Informatica Cloud Application Integration Connec | ther | Connected App | This is an upgraded component. It will be updated to the new version. |

4. Click Upgrade.

5. Click **Done** after the upgrade is complete.

| Upgrade Informatica Cloud Real Time for Salesforce By Informatica | | | | | | |
|----------------------------------------------------------------------|----------------------|---------------|----------------|--|--|--|
| i Upgr | ade Complete! | | | | | |
| | | | Done | | | |
| App Name | Publisher | Version Name | Version Number | | | |
| Informatica Cloud Rea Salesforce | Time for Informatica | 4.07_20230303 | 1.26 | | | |

Note: If the upgrade takes a long time, a message appears stating that you will receive an email when the upgrade is complete. Click **Done**.

The Installed Packages page appears with the upgraded managed package under Installed Packages.

| Installed Packages | | | | | | | | Help for this Page |
|------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|------------------------------|----------------------------------|----------------------------------|--------------------|---------------|--------------|---------------------------|
| On AppExchange you can browse, test drive, download, and install pre-bui | It apps and components right into your s | alesforce.com environment | Learn More about Installing Pac | kages. | | | | |
| Apps and components are installed in packages. Any custom apps, tabs, i using the other features in setup or as a group by clicking Deploy. | and custom objects are initially marked | as "In Development" and are | not deployed to your users. This | allows you to test and customize | before deploying." | rou can depli | by the compo | nents individually |
| Depending on the links next to an installed package, you can take different | actions from this page. | | | | | | | Visit AppExchange |
| Fo remove a package, click Uninstall . To manage your package licenses, o | lick Manage Licenses. | | | | | | | |
| Installed Packages | | | | | | | | |
| Action Package Name | Publisher | Version Number | Namespace Prefix | Install Date | Limits | Apps | Tabs | Objects AppExchange Ready |
| Uninstall 📥 Informatica Cloud | Informatica Corp | 5.15 | Informatica | 02/05/2019 21:22 | | 1 | 1 | 0 Passed |
| Uninstall 📥 Salesforce Connected Apps | Salesforce.com | 1.7 | sf_com_apps | 26/07/2016 00:06 | 1 | 0 | 0 | 0 NotPassed |
| Description This package contains Connected Applications for all the | officially supported Salesforce client ap | plications such as Touch, Sa | lesforce for Outlook, Sa | | | | | |
| Uninstall 📥 Cloud Extend | Active Endpoints | 3.205 | ce4sf20_001 | 09/05/2020 08:03 | | 1 | 4 | 4 NotPassed |
| Description Informatica Cloud Extend for Salesforce Package | | | | | | | | |
| Uninstall 📩 Informatica Cloud Real Time for Salesforce | Informatica | 1.26 | iert | 25/07/2016 23:51 | 1 | 1 | з | 5 NotPassed |
| Description Informatics Cloud Application Integration Package for Sa | lesforce | | | | | | | |
| | | | | | | | | |

Uninstalling and Deleting the Salesforce Managed Package

The following steps detail the procedure to uninstall and delete the Salesforce managed package:

- 1. Log in to your Salesforce developer account.
- 2. Click Setup.
- 3. In the Quick Find / Search box, search for Installed Packages.
- 4. In the Installed Packages page, click Informatica Cloud Real Time for Salesforce.

Note: Before you uninstall the managed package, ensure that you delete all the artifacts that depend on the Informatica Cloud Real Time for Salesforce. For example, custom pages, buttons, page layouts, Visualforce pages.

5. Click Uninstall at the top of the page.

| « Back to List: Installed Package | Real Time for Salesforce (Mana | aged) | |
|-----------------------------------|-------------------------------------------------------|-----------------------------------|--------------------|
| Installed Package Detail | Uninstall View Components | Become Primary Contact View Deper | ndencies |
| Package Name | Informatica Cloud Real Time for Salesforce | Version Number | 1.24 |
| Language | English | First Installed Version Number | 1.24 |
| Version Name | 3.330_20171207 | Package Type | Managed |
| Namespace Prefix | icrt | Modified By | 8/16/2019 12:59 AM |
| Publisher | Informatica | | |
| Description | Informatica Cloud Real Time for Salesforce Package | | |
| Installed By | 8/16/2019 12:59 AM | | |
| Count Towards Limits | ✓ | Tabs | 3 |
| Apps | 1 | Objects | 5 |

Package Details Informatica Cloud Real Time for Salesforce (Managed)

The Uninstalling a Package page appears with a list of all package components.

6. You can choose to save the package data for 48 hours after you uninstall the package. Click Uninstall.

Save a copy of this package's data for 48 hours after uninstall

Do not save a copy of this package's data after uninstall

Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

If you do not delete all the artifacts that depend on the Informatica Cloud Real Time for Salesforce, the uninstallation might fail.

Uninstalling a Package

| Problems | | | | |
|-----------------------|--------------------|-------------------------------------------------------------------------------|--|--|
| Component Type | Name | Problem | | |
| Visualforce Component | AeSalesGuides | Component is in use by another component in your organization. CustomButtonCA | | |
| Connected App | CloudExtendConnApp | Component is in use by another component in your organization. CustomButtonCA | | |
| Apex Class | AeSecurityTokenCE | Component is in use by another component in your organization. CustomButtonCA | | |

Delete the dependent artifacts and uninstall the package again.

7. After you uninstall the package, the Informatica Cloud Real Time for Salesforce package appears under Uninstalled Packages on the Installed Packages page and the status displays as In Progress.

| Uninst | alled Packages | | | | |
|--------|-------------------------------------------------------------------------|-----------|-------------------|------------------|-------------------|
| Action | Package Name | Namespace | Expiration Date | Uninstall Status | Uninstall Date |
| | Informatica Cloud Real Time for Salesforce (Version Name 4.05_20190828) | icrt | 8/31/2019 3:02 AM | In Progress | 8/29/2019 3:02 AM |

After the uninstallation is complete, the status displays as Uninstall Complete.

| Uninstall | ed Packages | | | | |
|-----------|-------------------------------------------------------------------------|-----------|-------------------|--------------------|-------------------|
| Action | Package Name | Namespace | Expiration Date | Uninstall Status | Uninstall Date |
| Data Del | Informatica Cloud Real Time for Salesforce (Version Name 4.05_20190828) | icrt | 8/31/2019 3:02 AM | Uninstall Complete | 8/29/2019 3:02 AM |

To delete the managed package, click **Del** under **Action**.
 A dialog box prompts you to confirm if you want to delete the managed package. Click **OK**.

More Information

To learn more, see the Using Salesforce System Services, Listeners and Connectors section under Design.

CHAPTER 2

Running a Guide within a Salesforce Organization

This chapter includes the following topics:

- Running a Guide within a Salesforce Organization Overview, 16
- <u>Connected Apps Guide Integration with Salesforce1 Mobile Applications, 20</u>
- <u>Accessing Data in Other Salesforce Organizations, 29</u>

Running a Guide within a Salesforce Organization Overview

To run a guide from within your Salesforce organization, create a guide in Application Integration and select a Salesforce object in the **Start > Applies To** property. You can open guides in Community Sites that are enabled with Salesforce enhanced domain.

Before you run a guide in Salesforce, you need to perform some tasks to prepare your organization.

Note: If you have migrated to the Informatica Intelligent Cloud Services[™], log in to Salesforce and verify that your guides are visible on the relevant Salesforce object pages. If you do not see your guides, log out of Salesforce, clear the browser cache, and then log in to Salesforce.

Step 1: Install the Salesforce Managed Package

Log in to Salesforce and install the Informatica Cloud Real Time for Salesforce package. The managed package connects your Informatica Intelligent Cloud Services and Salesforce accounts.

For information on how to install the managed package, see <u>"Installing the Salesforce Managed Package" on</u> page 7.

Step 2: Create a Salesforce Connection

Log in to Application Integration, and create and publish a Salesforce connection in the organization in which you have installed the managed package.

If your guide applies to a Salesforce object and you want to run the guide from Salesforce, ensure that the Salesforce connection associated with the guide has the unique name as **Salesforce**. To view the unique name, right-click the connection and select **Properties Detail**.

The following image shows the unique name for the connection:

Properties Detail for Salesforce

| Basic | |
|---------------------|-------------------------------|
| Unique Name: | Salesforce |
| Publication Status: | Published |
| Published On: | 2019-07-23 11:29 |

Informatica recommends that you have a single Salesforce connection with the unique name **Salesforce** in the organization.

Note: Do not use the connection with the unique name **Salesforce** within a process that contains other Salesforce connections. Create a new connection with a different name, if needed.

For information about creating a Salesforce connection, see the Salesforce Connector Guide in the Connectors section of the online help.

Step 3: Create and Publish a Guide

Log in to Application Integration and create a new guide.

If you want to run a guide from Salesforce, the guide must be associated with a Salesforce object.

- In the properties section of the Start step, you must set the Start > Applies to property to a Salesforce object.
- 2. Save and publish the guide.

Note: If you set the property to Home, the guide appears on your Salesforce Home page.

The following image shows a guide that applies to the Salesforce Contact object:

| Start Properties | | | |
|------------------|-------------|--------------------|-------------------|
| General | Applies To: | Contact (Salesford | ce) 🔻 |
| Start | Run As: | Current User 🔻 | (Salesforce Only) |
| Screens | | | |
| Input Fields | | | |

Step 4: Set Up Salesforce to View Guides

To set up the Salesforce page of an object to view related guides, create a section in the home page of the Salesforce object and then add guides to the section.

- 1. Log in to your Salesforce account.
- 2. Click All Tabs and then select the object that you specified when creating a guide.

The object's Home page appears.

| Contacts Home View: New Last Week | Jan Mari | |
|------------------------------------------|--------------|----------------------------|
| View: New Last Week Go! Edit Create N | vew view | |
| Recent Contacts | New | |
| Name | Account Name | |
| John Snow | | |
| | | |
| Reports | | Tools |
| HTML Email Status Report | | Sync to Outlook |
| Partner Accounts | | Import Accounts & Contacts |

3. Select the item for which you want to see Application Integration guides.

The item details page appears.

| John Snow | Customize Page Edit Layout Printable View Help for this Page 🥝 |
|-----------------------------------|------------------------------------------------------------------|
| Hide Feed Click to add topics: | |
| 😰 Post 📲 File 🦧 New Task 🛛 More 👻 | Follow |
| Write something Sha | |
| Q Show All Updates ~ | No followers. |

4. Click Edit Layout.

The Layout page appears.

| Contact Layout - | | | | | | | |
|-------------------------------------------------------------------------|------------------|---------------|--------------|--|--|--|--|
| Save 🔻 Quick Save Preview As 🔻 Cancel 🛷 Undo 🐟 Redo 📻 Layout Properties | | | | | | | |
| Fields 🔺 | Quick Find Field | Name |) | | | | |
| Buttons | → Section | Asst. Phone | Created By | | | | |
| Quick Actions | * Blank Space | Birthdate | Data.com Key | | | | |
| Mobile & Lightning | Account Name | Clean Status | Department | | | | |
| Actions Expanded Lookups | Assistant | Contact Owner | Description | | | | |
| Related Lists | | | | | | | |

5. Drag a **Fields > Section** onto the page layout area below.

The Section Properties dialog box appears.

| Section Properties | | | × | |
|----------------------------------------------------|-----------|------------|------------|--|
| Section Name | Guides | | | |
| Display Section Header On C Detail Page Edit Page | | | | |
| Layout | | Tab-key C |)rder | |
| | | 0-0 | 000 | |
| 1-Column 2 | -Column 🔘 | Left-Right | O Top-Down | |
| | OK Cancel | | | |

6. In the Section Name field, enter Guides and then click OK.

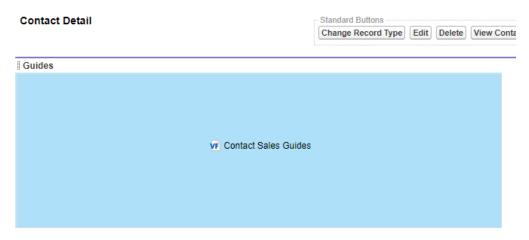
A section called **Guides** appears in the page layout of the object.

| Contact Detail | Standard Buttons [Change Record Type] Edit] Delete View Contact Hierarchy] Clone Change Owner] Sharing Submit for Approval Check for New Data ('Card' | Buttons |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| i Guides | | |

7. From the top of the page, select Visualforce Pages and then select a guide.



8. Drag the guide on to the Guides section of the page.



All published guides that apply to this Salesforce object appear as links here. Click a link to run the guide.

Connected Apps Guide Integration with Salesforce1 Mobile Applications

With Guide Designer, you can integrate guides with your Salesforce1 mobile applications. This type of integration requires you to use the Salesforce managed package as a Connected App.

Before you start:

- Download the Salesforce1 app.
- Log in to the Salesforce1 app and verify that your environment is working correctly.

The integration requires the following steps:

- 1. Create a Visualforce page and enable it for Mobile Apps.
- 2. Create a new Action for the object in Salesforce.
- 3. Enable Publisher actions in Salesforce.
- 4. Put the new Action on the Salesforce object page.
- 5. Verify the Mobile App runs as expected.

Step 1: Create a Visualforce Page and Enable it for Mobile Apps

- 1. Log in to your Salesforce organization as a system administrator.
- 2. From the Setup menu, selectApp Setup > Develop > Pages.
- 3. Click New.
- 4. Enter a label, for example, aeOpportunityGuideMobileEnabled.
- 5. Check Available for Salesforce mobile apps.
- 6. Add the Visualforce markup as shown here:

Markup for a Home guide:

```
<are>capex:page sidebar="false" showHeader="false" standardStylesheets="false"
cache="true" expires="300" docType="html-5.0" >
<head>
<meta name="viewport" content="width=device-width, initial-scale=1,
maximum-scale=1.0, user-scalable=no" />
</head>
<body style="margin: 0px; padding:0px;">
<<u>icrt</u>:AeSalesGuides sfl="navigation" objectType="_any"
objectId="{!$User.Id}" extraInfo="Home Guides" nothingOnDone="true"
match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))},
Profile={!JSENCODE(SUBSTITUTE($Profile.Name, ",", ""))}" />
</body>
</apex:page>
```

Markup for an Account guide:

```
<apex:page standardController="Account" sidebar="false" showHeader="false"
    standardStylesheets="false" cache="true" expires="300" docType="html-5.0" >
    <head>
        <meta name="viewport" content="width=device-width, initial-scale=1,
            maximum-scale=1.0, user-scalable=no" />
        </head>
    <body style="margin: 0px; padding:0px;">
        <<u>iicrt</u>:AeSalesGuides sf1="publisher" objectType="Account"
        objectId="{!Account.Id}" extraInfo="{!JSENCODE(Account.Name)}"
        match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))},
        Type={!JSENCODE(SUBSTITUTE(Account.Industry, ",", ""))}"/>
        </body>
```

For other objects, adapt the Visualforce page code for the object you want to work with.

7. ClickQuick Save to verify that there are no errors.

Step 2: Create a New Action for the Object

- From the Setup menu, select the App Setup option for the object you want to work with. For example, App Setup > Customize > Opportunities > Buttons, Links and Actions.
- 2. Click New Action and add the Visualforce page created in Step 1.

Step 3: Enable Publisher Actions

- SelectApp Setup > Customize > Chatter > Settings.
- In the Publisher Actions section, check Enable Publisher Actions.

Step 4: Put the New Action on the Object Page

- 1. Select App Setup > Customize > Page Layout > Opportunity.
- 2. Click Edit. Locate the newly-defined action in the Actions list.
- 3. Drag and drop items to the location within the Publisher Actions section. This is before the Post Action.

| Save • Quick Save | Preview As • Cancel | 🔷 Undo 🔍 Redo | E Layout Properties | | | |
|---------------------------------------------------------------------------|----------------------------|----------------------|---------------------|----------|-----------|------|
| Fields | Quick Find Actio | on Name 🛛 🗴 | | | | |
| Buttons | CE Process Apps | Mobile Smart Actions | New Event | New Task | | |
| Actions | File | New Account | New Lead | Poll | | |
| Expanded Lookups | Link | New Case | New Note | Post | | |
| Related Lists | Log a Call | New Contact | New Opportunity | 1 | | |
| Report Charts | | | | | | |
| fieunifarea Danne | 2 | | | | | |
| Opportunity Sample | | | | | | |
| Opportunity Sample Highlights Panel | | | | | | |
| Highlights Panel | phis panel for this page I | ayout | | | | |
| STALL ST. | | layout | | | | |
| Highlights Panel Customize the highli | | | r Case New No | | vent Link | Poll |
| Highlights Panel Customize the highli Publisher Action | s New Task | | | | vent Link | Poll |
| Highlights Panel Customize the highli Publisher Action Post File | New Task | | / Case New No | | vent Link | Poll |

| and the second se | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|----------------------|-------------------|----------|----------|-----------|------|------|
| Save * Quick Save Pr | eview As* Cancel | S Undo Redo | Layout Properties | | | | | |
| ields 📩 | Q Quick Find Actio | n Name | | | | | | |
| utions | CE Process Apps | Mobile Smart Actions | fleve Event | New Task | | | | |
| ctions _ | File | New Account | New Lead | Pull | | | | |
| xpanded Lookups | Link | New Case | New Note | Post | | | | |
| elated Lists | Log a Call | New Contact | New Opportunity | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| inunHarra Baana | | | | - | | | _ | _ |
| euntere Donne 👘 | | | | - | _ | | | _ |
| inunHarra Danna | | | | - | _ | | | |
| Sportunity Sample | ts panel for this page is | iyut | - | - | _ | _ | | |
| Opportunity Sample Highlights Panel Customize the highligh | ts panel for this page is | iyout | | | | | | |
| Sportunity Sample Highlights Panel | ts panel for this page is | iyout | | | | | | |
| Customize the highligh | ts panel for this page in | iyout | | iew Case | New Note | New Event | Link | Poll |

4. Save the layout.

Step 5: Verify

Verify the newly added action in the SFDC1 mobile app.

- 1. Login to the mobile app.
- 2. Select an opportunity.

| | ₹▲ 🛢 2:3 |
|--------------------------------------------------|----------|
| Search Opportunities | |
| Recent Opportunities | New |
| All Opportunities | |
| 2testSR1-230000095 Account Name : CE01 | |
| New Opportunity Account Name : salesforce.com | |
| PortalOpportunity Account Name : Acme | |
| newopps Account Name : CE01 | |
| testSR1-230000095 Account Name : CE01 | |
| Acme-1500 Laptops Account Name : CE01 | |
| FreshOpps01 Account Name : Bob Account | |
| \leftarrow | <u> </u> |

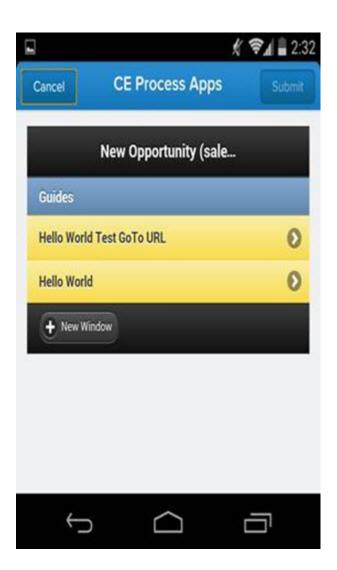
3. Press the "+" button that brings up the publisher actions, which includes the "CE Process Apps" action.

| | | () ? , | 2:31 |
|------------------------------|---------|-------------------|------|
| = | | | |
| | | 200 | |
| New O /Qualification • 23 | oportun | | |
| Guainication • 23/ | | 21,000.00 | , |
| • | • • | | |
| Edit | | | • |
| Opportunity Owner | | | |
| Bob Test | | | |
| Close Date | | | |
| 23/05/2013 | | | |
| Opportunity Name | | | |
| New Opportunity | | | |
| Stage | | ſ | |
| Qualification | | | + |
| ý (| | | 1 |

4. Press **CE Process Apps** to display the Designer Visualforce page. It may take a few seconds to load.



You should see the list of guides that are marked to run on a mobile device.



5. Choose one of those guides to see if it runs successfully.

| | k | 🔊 🖘 🔒 2:33 |
|-----------|----------------------------|------------|
| Cancel | CE Process Apps | Submit |
| | Hello World Test GoTo | |
| Hello Wor | ld - This is my first step | |
| Welcom | ne | |
| Continue | 0 | _ |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| ¢ | \Box | |

Creating a Salesforce1 App

- 1. Create a Visualforce Tab
- 2. Add it to the Mobile Navigation menu.
- 3. Add a new tab and add the Visualforce page you just created.
 - a. Select Setup > Create > Tabs.
 - b. In the Visualforce Tabs section, click New.
 - c. In the Visualforce Page drop-down list, select the page you created in the previous step.
 - d. In the Tab Label field, enter a label name. Note that, this label appears on the navigation menu in Salesforce1.
 - e. Click into the Tab Style field, and select some a style. The icon for this style appears as the icon for the page in the Salesforce1 navigation menu.
 - f. Click Next.
 - g. Click Next to accept the visibility defaults.

- h. Deselect the **Include Tab** checkbox so that the tab isn't included in any of the apps in the organization. You only want this tab to appear when users are viewing it on their mobile device.
- i. Click Save.
- j. On the Custom Tabs screen in the Visualforce Tabs section, click **Edit** next to the new tab that you created.

| Edit Visualforce Custom Tab | |
|----------------------------------------------------------|-----------------------------------------------------------------------------------|
| Fill in the fields below to define th | e Visualforce custom tab. |
| Custom Tab Definition Edi | t |
| Visualforce Custom Tab Info | ormation |
| Tab Label | CE Opportunities |
| Tab Name | CE_Opportunities |
| Content | aeOpportunityGuideMobileEnabled |
| Tab Style | 📸 Building Block 😋 |
| Mobile Ready | What Is This? |
| (Optional) Choose a Home Page Splash Page Custom Link | Custom Link to show as a splash page the first time your users click on this tab. |
| Enter a short description. | |
| Description | This is a test VF tab to verify CE Process Guides as a tab in SFDC1 |
| | |
| | Save Cancel |

- 4. Add the new tab to the navigation menu. Here, it is added as a navigation menu item. It will instantly become available to Salesforce1 app users that have access to it.
 - a. Select Setup > Mobile Administration > Mobile Navigation.
 - b. Select the newly added tab and click Add to move it over to the selected list in the right.

| Available | | Selected | |
|------------------|-------------|-----------------------------------|---|
| CE Opportunities | Remove Dash | ile ps t Search Items iy | |
| - | * | | * |

- c. Click Save.
- 5. When your Salesforce1 users log in, they'll see the CE Opportunities menu item in the navigation menu.

Test it out by opening the app. You should be able to open your side menu in Salesforce1 and see your Visualforce Tab in this menu
 Note: You might need to clear the cache for the app if the page does not display immediately.

Accessing Data in Other Salesforce Organizations

After the Salesforce connector is added to your managed package, you can access Salesforce objects from within guides and processes. If you need a guide or process in one Salesforce organization to access data in another, perform these additional configuration actions:

- Perform guide setup in the organization where you want to run the guides.
- Create an additional connection for any other Salesforce organization you need to access.
- In the guides that use Salesforce objects, the objects are from the primary guide's organization. Use the other connection(s) you added to access objects from the other organizations in your guides or processes.

CHAPTER 3

Techniques

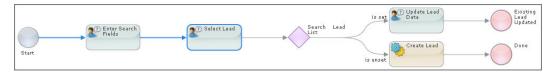
This chapter includes the following topics:

- Checking for Duplicate Leads and Contacts, 30
- Email Actions (Salesforce), 34

Checking for Duplicate Leads and Contacts

When entering a new lead or contact, you may want to check if it already exists. This topic demonstrates how to do this.

Here's what the completed guide looks like:



Step 1: Set Guide Properties

This is really the crucial step. The guide must access data of some kind but the fields do not exist into which they can be entered as the guide will not be associated with an object. You can create the fields that Guide Designer will use to store this data by using the *Guide Fields* tab.

| | | , | v | | _ | |
|-----------|----------------------------------------------------------------------------------|------------------|---------------|----------|---------|---------|
| General | Possible Outcomes | Guide Fields | Translate | Advanced | Notes | |
| uide that | ds are provided by the o t calls this as an embed from screens for use lat | lded guide. Terr | porary fields | | | |
| Input Fie | ۶ld | Ту | pe | | Require | ed |
| Search F | First Name | Т | ext | • | | • |
| Search L | ast Name | Т | ext | • | | ۲ |
| Search L | .ead List | 0 | bject ID | • |) | • |
| 0 | | | | | | |
| Output F | ïeld | | | Туре | | |
| 0 | | | | | | |
| Tempora | ry Field | | | Туре | | |
| | | | | | 0 | K Cance |

Now that these fields exist, you can insert them in steps and the data that users enter can be used in searches.

The three fields created are:

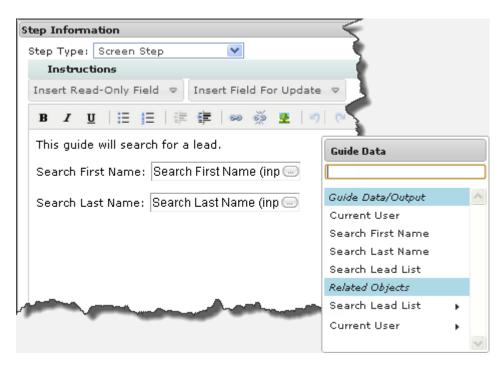
- Search First Name
- Search Last Name
- Search Lead List

Notice that the type of the first two is Text and the last is Object ID. Guide Designer searches for the name. If it is found, it also has the object ID associated with the name. This means that the person was found.

You will want also want to set to create a guide that is not directly associated with a Salesforce object. Also, you should place it on the Home page so that users will have a place from which they can launch it.

Step 2: Create a Screen Step for entering a name

Create a Screen Step into which a user can type a first and last name.



Insert two updateable fields using the picklist. Notice that the three fields defined in the *Guide Fields* tab are there.

Step 3: Create a screen step for selecting a lead

In this step, you will need to set an inserted field's properties, as is shown in the next figure.

| Step Information | |
|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step Type: Screen Step | |
| Instructions | |
| Insert Read-Only Field ♥ In | sert Field For Update 🗢 |
| B <i>I</i> <u>U</u> ≒ ⊨ ≣ ≢ € | ■ ∞ 👾 星 ୭) (♥ 🔲 マ |
| Select the Lead to edit an exit | sting lead or press Continue to create a |
| | Field Properties X |
| Search Lead List 🛛 📼 | Field: Search Lead List |
| | Show List: Object Query 💙 |
| | Reference To: Lead |
| | Columns: |
| | Height (rows): Default Constant VNone Selected 🔍 |
| | Value: |
| | Required: |
| (double click on field to change | Object Query ? |
| *Prompt: Select Lead Answers: Continue | Allows for querying an object. Object query is done by specifying zero or more expressions, as a where clause. The results of the query will be displayed as a table or as a dropdown, depending on the number of display columns used. |
| Preview | Name Source Where Clause Constant ♥ FirstName LIKE '%{linput.Search First Name}%' and LastName LIKE '%{linput.Search Last Name}%' |
| | Add Condition |
| | OK Cancel |

The step will display a list whose contents come from an object query. This query uses the contents of the fields that were filled in within the previous step as part of the query's Where clause.

Don't be concerned about the information within the curly braces "{}". If you use the **Add Condition** dialog, Guide Designer adds them for you.

| Condition | | Guide Data | | × |
|-----------------------------------------------------------------------------------------------------------------|---|------------------------|-------|-----|
| Field Name 🔍 Equals 💟 Field | * | Start typing to filter | | |
| | | Current User | ~ | - 1 |
| | | Search First Name | | - 1 |
| | | Search Last Name | | - 1 |
| | | Search Lead List | | |
| | | Related Objects | ٤l | |
| | | Search Lead List | | 10 |
| | | Current User | | |
| | | | | |
| the second se | | | | |
| | | | - | |

After Guide Designer executes this step, it will show a four-column table. It will have the three columns entered within the Display Columns area and a fourth column containing radio buttons. If the lead is within the table, the user will select one of them.

Step 4: Was something returned?

After the previous step executes, it sets the value of the Search Lead List field. You can now add a decision step that tests if this field was "set" or "unset", indicating if something was or was not found.

| Step Inform | ation |
|-------------|------------------------|
| Step Type: | Data Decision Step 💌 🍃 |
| Field: | Search Lead List 🗢 |
| Answers: | |
| Answer 1: | is set |
| Answer 2: | is unset |
| | < |
| | |
| han have | |
| - | Call W |

Step 5: Next Steps

All that is left is create the steps that follow the decision step. In this example, one branch is followed when the lead does not exist and the other for when it does.

| Step Information | |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Step Type: Screen Step | |
| Instructions | |
| Insert Read-Only Field ♥ Inse | Step Information |
| B Z ∐ 1 ⊟ 1 ⊟ 1 ≡ 6 ≢ | Step Type: Create Title: Create Lead Action: Create Lead |
| First Name Search Lead List>Fi | Information Input Input Screen |
| Company Search Lead List>Co | Name Source Last Name* Screen Total N Oppose |
| Title Search Lead List>Title - | First Name Screen 💙 Title Screen 💙 |
| | Company* Screen 💟 Email Screen 💟 |
| and the second | Use this to provide more data for the step Add Input |
| ļ | had an and the second s |

Email Actions (Salesforce)

This topic describes the email actions that Salesforce provides.

Send Email Using Template and Send Free-Form Email

The **Send Email Using Template** and **Send Free-Form Email** actions are very similar as they both send email. The difference between them is that a template contains the subject and body of the email while the free form requires you to add them.

- When using a template, you will need to specify either the object to take information from or the email address, but not both. If neither is specified, the email is sent to the address within the current object.
- If there is no template, you will need to add a subject and the email's body. Specify either the object or the email address, but not both. If neither is specified, the email is sent the current person.

Note: Unlike other steps, email steps cannot be rolled back either by selecting a step in the History or by you backing up to it. This is because the email is already sent. Also, if you do step back to this step or one executed prior to it, the email will again be sent.

Using **Send Free-Form Email** is often better than **Send Email Using Template** even when there's a template that meets your needs because using a template doesn't give your users any flexibility. However, there's a way to use a template and allow users to modify things. Do this by using the **Send Free-Form Email** Service Call step, and setting the source of email's body to **Screen**. Next, double click on the body's input field and then insert the email template so that it is the default value of the field. This default value can include fields of any object that is available from the guide. Your users will see the template shown in an HTML editor inside the step with its data inserted for field values used by the template.

You can add attachments to an email. While all attachments are files, Salesforce differentiates attachments by where they exist and how they are used:

- Attachment Attachment: The files named in Salesforce attachment lists. These lists appear in the detail pages of some objects. These attachments can include feed attachments.
- **Content Attachments**: Shared and published corporate files. These files are typically shared with coworkers or sent to customers. For example, they could be Google Docs.
- **Document Attachments**: Web resources that others from your site have placed on the Web. Some of the kinds of information that are contained within documents attachments are logos, graphics, and template files.
- File Attachments: Files that you upload. While these are initially private files, they can be shared with coworkers.

Email iCal for Event Action

This action sends a calendar invitation by email (in iCalendar format) for the meeting created as a Salesforce Event. The dates and times are the same as the dates and times of the event. The email recipients who can log in to your Salesforce site receive an iCalendar file that contains a link to the **Event** within Salesforce. The Salesforce user to which the event is assigned receives a link that when clicked starts the guide for the event.

| tep Infor | nation | | | |
|-----------------------------------------------------|----------------------------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| Step Type: | Ser | vice Call | ~ | * |
| Title: | Send E | mail iCal Fo | r Event | |
| Action: | Salesfo | orce > Emai | I > Send Email iCal For Event ♥ | |
| Informa | ation | Input 1 | Input Screen | |
| Send E | imail iO | al For Eve | ent | |
| locatio recipie the inv link to descrip | the mee n, dates ints that itation. the guid | eting repres s and times : are Salesfo The User th | lar invitation by email (as an iCal attachment) for ented by a Salesforce Event. The subject, will be the same as the Event's. The email orce Users, will get a link to the Event object in at the event has been assigned to will also get a r for the event. The invitation will also contain the | III |
| Name | | Туре | Description | |
| Event | | Object ID | Reference[Event] | |
| Send t assigne | o ed user | Checkbox | If checked, the email will be sent to the email address on file for the user the event is assigned to. | |
| Send to Contac Lead | - | Checkbox | If checked, the email will be sent to the email address on file for the Lead or Contact that this event is for. | - |
| Preview | | - | OK Cancel Apply | |

The **Email iCal for Event** Service Call step uses up to six fields. The first four are required. The final two are optional. The following figure shows these fields on a step's Input tab.

| | Service Call 🔻 |
|-------------------------------|-----------------------------------------------|
| | |
| itle: Sen | d Email iCal For Event |
| Action: Sale | esforce > Email > Send Email iCal For Event 🗢 |
| Information | Input Input Screen |
| Name | Source |
| Event | Field 		 Click To Select Field 		 ♥ |
| Send to assigned user | Constant 🔻 🔲 |
| Send to Contact or Lead | Constant 🗸 🔲 |
| Send to Other Invitees | Constant 👻 🔲 |
| Use this to | provide more data for the step |
| Add Input | |
| | |

These fields are:

• **Event**: The object ID that is a reference to an event. Process Designer will provide this ID. In this figure, the ID is that of the current Activity ID. You can, of course, select another field; for example, you can also select the ID for other events.

| Step Infor | mation | |
|-----------------------------|---------------------------|------------------------------------------------------|
| Step Type: | Service Call 👻 | |
| Title: | Send Email iCal For Even | t |
| Action: | Salesforce > Email > Se | nd Email iCal For Event 🗢 |
| Inform | ation Input Input S | Screen |
| Name | Source | |
| Event | Constant 👻N | one Selected |
| Send to assigne user | | Lookup Event X |
| Send to Contac Lead | | Go! Use * as a wildcard in place of any character |
| Send to Other Invitee | Constant 👻 📃 | |
| | s to provide more data fo | r t |
| | | |
| Preview | | Alternatively: |
| | J | Clear Salesforce:Event Reference |

You can also use a query to select the event.

- Send to assigned user: If checked, the email is sent to the email address stored within Salesforce for the user to which the event is assigned.
- Send to Contact or Lead: If checked, the email is sent to the email address stored within Salesforce for the lead or contact that this event is for.
- Send to Other Invitees: If checked, the email is sent to the email addresses stored within Salesforce for the users, leads or contacts that are listed for this event.
- Other Recipients: A semicolon separated list of email addresses of other people you would like to attend the event.
- Body: Optional text that is inserted into the email after any links that are sent.

CHAPTER 4

Customizing Salesforce

This chapter includes the following topics:

- Customizing and Creating Salesforce Pages, 39
- Attributes to Customize Salesforce Pages with Guide Designer, 42
- Creating a Button or Link to Launch a Guide, 43
- Running a Guide When the User Clicks New, 49
- Adding Guide Areas to Salesforce Pages, 50
- Implementing Service Steps and Search Services, 55

Customizing and Creating Salesforce Pages

You can use Visualforce page definitions for most of the common Salesforce objects. However, you may use other objects from which you want to launch guides or you may create your own. This topic discusses how to create and use a Visualforce page. This example will use the CampaignMember object. This process is straight forward and only contains three steps. If you are using version 27 of the Salesforce API, please read the note at the end of this topic.

Note: See <u>"Adding Guide Areas to Salesforce Pages" on page 50</u> for a more complete discussion as this section omits some of the details shown there.

1. Create the Campaign Member Sales Visualforce Page. The markup you will add is:

```
<apex:page standardController="CampaignMember">
<icrt:AeSalesGuides objectType="CampaignMember" objectId="{!
CampaignMember.Id}"/>
</apex:page>
```

| Expand All Collapse All | Visualforce Page |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Force.com Home | Page Edit Save Ouick Save Cancel Where is this used? Component Reference |
| System Overview | Page Information = Required Information |
| Personal Setup My Personal Information Email Import Desktop Integration My Chatter Settings | Label Campaign Member Sales Campaign Member Sales Description Visualforce Markup Version Settings |
| App Setup Customize Create Develop Apex Classes Apex Triggers Apex Triggers Apex Test Execution API Components Custom Settings Email Services Pages Sites Static Resources Tools Remote Access | <pre> A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A</pre> |

2. After you save the Visualforce Page, edit the page layout for the Campaign Member:

| Campa | aign Member Page La | ayout | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------|-------------|--|--|--|--|
| This page allows you to create different page layouts to display Campaign Member data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default. | | | | | | | |
| Campaig | n Member Page Layouts | ew Page Layout Assignment | | | | | |
| Action | Page Layout Name | Created By | Modified By | | | | |
| Edit Del Campaign Member Page Layout Bob Released, 10/28/2011 10:40 AM Bob Released, 10/28/2011 10:40 AM | | | | | | | |
| | | | | | | | |

3. Add the new page to a section in the page layout:

| Campaign Member Pag | ie Layout v |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Save V Quick Save Previe | ew As 🔻 Cancel 📀 Undo 🖪 Redo 💼 Layout Properties |
| Fields Buttons Visualforce Pages | Quick Find Page Name * * Section * * Blank Space * Campaign Member S * |
| Campaign Member Sam | ple |
| Highlights Panel | |
| Customize the highlights | panel for this page layout |
| Campaign Member | Edit Delete Clone Create Opportunity Custom Buttons |
| Campaign Member Info | ormation (Header visible on edit only) |
| * Campaign | Sample Campaign |
| * Contact | Sample Contact |
| * Lead | |
| * Status | |
| Responded | \checkmark |
| Detail Information (Hea | ader not visible) |
| 🖻 Company (Account) | Sample Company (Account) |
| 🖻 Title | Sample Title |
| 🖻 Phone | 1-415-555-1212 |
| 🖻 Email | sarah.sample@company.com |

Salesforce API, Version 27

If you are using version 27 of the Salesforce API and are creating a Visualforce page to embed an AeSalesGuides Visualforce component using code similar to the following:

Salesforce displays the following error:

Error: <apex:attribute assignTo> cannot be same as the <apex:attribute name> (objectId)

This error prevents you from creating new Salesforce pages that have guides.

The following is copied from

http://salesforce-walker.blogspot.com/2013/02/sprin-13-release-notes-in-visualforce.html:

Compile-Time Checking for Custom Component Attribute Names:

In the Spring '13 release, there is a new compile-time check that prevents giving custom Visualforce component attributes the same name as the assignTo value (which can refer to a property or method in the component's controller). This checking prevents a number of programming errors (bugs) that can result in runtime errors. This change is versioned, and you must update your Visualforce components and the pages that contain them to API version 27.0 to enable the new behavior. Previously, it was possible to create a custom component with an attribute that had the same name as the assignTo value.

For example:

```
<apex:component>
<apex:attribute name="currentpagename" type="string"
assignTo="{!currentpagename}"
description="This component can't be saved."/>
```

This component is no longer allowed.

</apex:component>

Force.com Visualforce:

To make this component compile under API version 27.0, change either the attribute name or the assignTo value (which might require you to also change a controller method or property). For example:

```
<apex:component>
<apex:attribute name="thepagename" type="string"
assignTo="{!currentpagename}"
description="This component saves just fine."/>
This component is OK!
</apex:component>
```

Note: Both components, as well as the pages they are displayed on, must be updated to API version 27.0 to enable the new compile-time check.

Attributes to Customize Salesforce Pages with Guide Designer

You can use the following attributes when interacting with Visualforce pages in Guide Designer. For example, see <u>"Customizing and Creating Salesforce Pages" on page 39</u>

| Name | Туре | Description | |
|----------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| alwaysNewGuide | Boolean | Using this flag avoids any correlation with other running guides so guides that open always start from the beginning. | |
| closeOnDone | Boolean | True if a the window is closed when a user clicks done. This is used when a guide is launched in its own window. | |
| entrylds | String | omma-separated list of entry IDs to be displayed. | |
| extraInfo | String | r reporting purposes, extra info to be displayed in Informatica Cloud Real Time ports goes here. | |
| guideName | String | ames the guide that will be displayed. | |
| height | String | Optional height of the guide area iframe. If you do not use this attribute, the default vill be 100 percent of its container. | |
| id | String | An identifier that allows the component to be referenced by other components in the page. | |
| match | String | Comma-separated list of tags that are displayed. Guides that don't contain one of these tags are filtered out of the list for the user. This allows for both static and dynamic filtering as tags can be field values for example Status:Warm. | |
| nothingOnDone | Boolean | Indicates that the browser page is to stay where it is when the user hits Done. Note , however, the tab for the finished guide is closed. | |
| objectId | String | The ID of the object to be used as the context of the guides; for example Account.Id for use accounts. This parameter is required. | |

| Name | Туре | Description | |
|----------------|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| objectType | String | The type of record the guides is used with; for example, set to ${\tt Account}$ when used with accounts. This parameter is required. | |
| openIfOne | Boolean | If there is only one guide to display, open it and do not show the Guide Navigator. Note: This is always true if a guideName attribute is set, regardless of this setting. | |
| rendered | Boolean | Boolean value that specifies whether the component is rendered on the page. If it i ot specified, this value defaults to true. | |
| showCategories | Boolean | Turns displaying tags as categories on when true. Tags containing equal signs and tags beginning with a period are never shown. | |
| topLevelWindow | Boolean | If false, shows the 'open in new window' link. True means the Guide Navigator is a top level window. Default is false. | |
| useResponsive | Boolean | Using this flag when loading a named mobile guide on a desktop or tablet allows it to run. | |
| width | String | Width of the guide area iframe. If you do not specify a value, the default is 100 percent of its container. | |

Creating a Button or Link to Launch a Guide

This topic describes how to create a button or a link that launches a guide from a Salesforce object. The steps for doing this are:

- 1. Create a Visualforce page.
- 2. Update the Visualforce page's security settings.
- 3. Create a button (or link) for the desired Salesforce object.
- 4. Add the button (or link) the object's page layout.

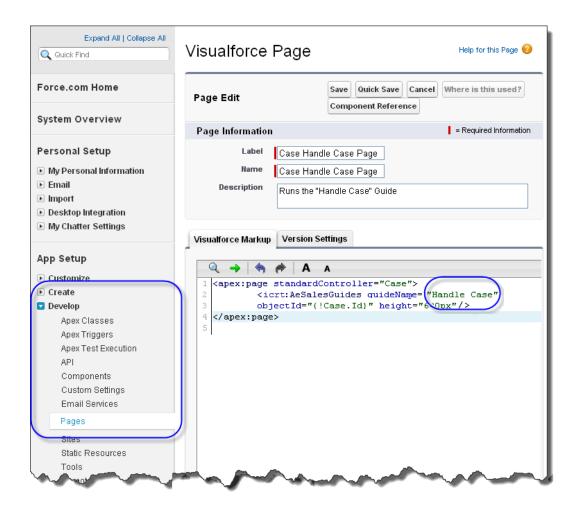
An example is used to show these steps. In this example, a button is added that launches the Handle Case guide. Here is the General tab of the **Guide Properties** dialog for this guide:

| General P | ossible Outcomes | Guide Fields | Translate | Advanced | Notes |
|--------------|---------------------|------------------|-----------|----------|-------|
| Name: | Handle Case | | | | |
| Applies To: | Case 🗸 | | | | |
| Description: | Guide the end use | | | | .41 |
| Tags: | Enter tags, use cor | nma to start nex | t tag. | | |
| | Desktop/Tablet 🖣 | | | | |
| Run On: | | | | | |
| Run On: | | | | | |

Creating a Visualforce Page

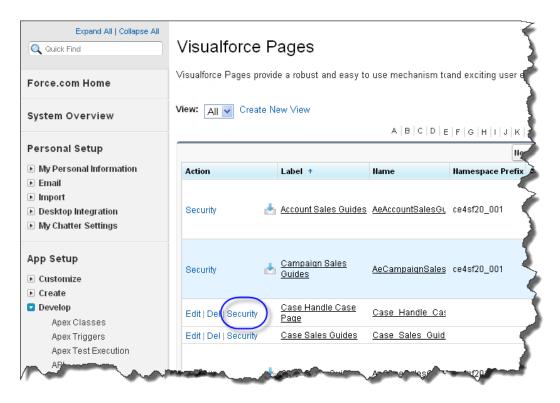
Set the Visualforce Markup to:

Note: Make sure that the guide's Name value here matches the name set in the Guide Properties dialog.



Update the Security for the Visualforce Page

Click the **Security** link for the page you just created:



Add one or more profiles displayed within the Available Profiles list to the Enabled Profiles list.

| Save | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------------|------------------------------------------------------------------------------|--|--|
| Available Profiles | | | Enabled Profiles | | |
| Authenticated Website Content Only User Contract Manager Customer Portal Manager Customer Portal Manager Custom Customer Portal Manager Standard Customer Portal User Force.com - One App User Gold Partner User Marketing User Read Only Standard Platform User Standard User | ~ | Add Remove | High Volume Customer Portal User Solution Manager System Administrator | | |

Save your changes.

Update the Page Layout

Select **Cases** | **Page Layouts** on the left. On the Case Page Layout page, click edit to display the page onto which you will be placing the button (or link).

Note: To add custom links to the page layout, select the Custom Links category on the palette and drag one or more custom links from the palette to the Custom Links section on the page layout.

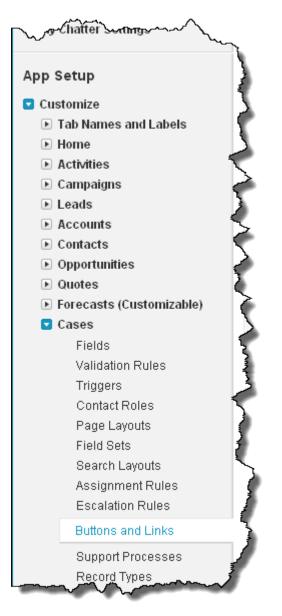
Notice that Buttons is selected on the left, not Visualforce Pages, which is the entry after this one.

| | review As▼ Cancel | 🔊 Undo 💊 Redo 📃 Layout Properties |
|----------------------------|-------------------|-----------------------------------|
| Fields | Quick Find Bu | itton Name 🔹 |
| uttons | Clone | Handle Case |
| isualforce Pages | Close Case | Sharing |
| Related Lists | Delete | Submit for Approval |
| | Edit | |
| | | |
| ase Sample | | |
| Case Sample Case Detail | | Standard Buttons |

Save your changes.

Create a Button on the Salesforce Page

Within the Custom Buttons and Links area, press New to create a new button.



Set the button's details similar to the following. Notice how **Detail Page Button**, **Behavior**, and **Content Source** are set. **Content Source** must be set to the Visualforce page that you created earlier.

| ase Custom Button or Link New Button or Lin | nk | Help for this Page 🥑 |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Custom Button or Lin | k Edit Save Quick Save Preview Cancel | |
| Label Name Description | Handle Case Handle_Case I | Ouick Tips • Getting Started • Sample Buttons & Links • Operators & Functions |
| Display Type | ○ Detail Page Link <u>View example</u> ⊙ Detail Page Button <u>View example</u> ○ List Button <u>View example</u> | |
| Behavior | Display in existing window with sidebar | |
| Content Source | Visualforce Page Content Case Handle Case Page [Case_Handle_Case_Page] | |
| | Save Quick Save Preview Cancel | |

Note: The way in which you create a link is similar; just select **Detail Page Link** instead of **Detail Page Button** and then use link in place of the button in the instructions that follow.

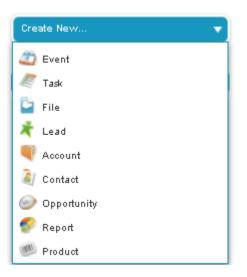
Launch the Guide

Open a case to see the newly added Handle Case button.

| Case 00001016 | 5 | | 1 |
|-----------------------|--------------------------------------------|--------------------------------------------------------|------------|
| | | Customize Page Edit Layout Printable View Help f | or this P |
| 💽 Show Chatter 😛 F | Follow | | |
| « Back to List: Pages | | | - 1 |
| Solutions (0) | Open Activities [0] Activity History [0] | Case Comments [0] Case History [3] Attachments | <u>n</u> 1 |
| Case Detail | Edit Delete Close | Case Clone Handle Case | |
| Case Owner | 👤 Eric Egertson [Change] | Contact Phone 314-555-1212 | - 1 |
| Case Number | 00001016 | Contact Email cb@gmail.com | |
| Contact Name | Clive Bixby | | |
| Account Name | Acme Dynamite | | |
| ▶ Sales Guides | | | |
| ▼ Additional Informa | ation | | |
| Status | New | Type _ Feature Request | _ |
| | man and the second | -Che P | - |

Running a Guide When the User Clicks New

Salesforce users can create new objects using the Create New picklist, a button, or a link.



After users select one of these, Salesforce displays a page into which the user can enter information. If you would prefer that they run a guide, you can override these actions for standard objects. Here's how:

- Go to that object's Buttons and Links setup page; for example, App Setup Customize > Opportunities > Buttons and Links.
- 2. Within the displayed table, find the New row, and then click Edit.
- 3. Select the Visualforce page on which you are going to override the New action.
- 4. Create the Visualforce page that runs the guide. For example, if you wish to run the Create Opportunity guide, you might create a page that runs it such as:

Adding Guide Areas to Salesforce Pages

This topic describes how you add Guide Designer Wizards to a user's Salesforce Home page.

Adding a Guide Area to the Home Page

- Open the Setup menu in the upper right corner of Salesforce. From the displayed page, select App Setup
 Customize > Home > Home Page Layouts. Both of these are indicated in the following figure.
- Click Edit for to make changes to your home page. You may have more than one page. In the Edit Home
 Layout page, go to the Select Wide Components to Show area, and check the Guide Designer Wizards
 checkbox. Click Next.

| Edit Home Layo | ut | | | Help for this Page 🥝 |
|--------------------------|-----------------------------------|----------------------------|----------|------------------------|
| Step 1. Select the com | ponents to show | | | Step 1 of 2 |
| Choose the components to | include on your home page layout. | | | |
| Layout Name | Dashboard Home Page D | | | |
| Select Wide Components | s to Show | | | = Required Information |
| Items to Approve | | Calendar | V | |
| Tasks | \checkmark | Dashboard Snapshot | ~ | |
| Cloud Extend Wizards | | | | |
| Select Narrow Component | nts to Show | | | |
| Create New | | Recent Items | V | |
| Messages & Alerts | V | Custom Links | ~ | |
| Tags | | Customer Portal Welcome | | |
| | | | | Hext |

3. Place the Guide Designer Wizards component in the position where it should display on the page. When you're done, click **Save**.

After adding the Guide Designer Wizards component, an area displays for all users who see this page. On a PC or Mac, users do not see wizards whose Run on setting is set to *Smart Phone*. Similarly, smart phone users do not see wizards whose *Run on* setting is *Desktop/Tablet*.

Adding Guides to Salesforce Pages

This topic describes how you install a guides area on page; that is, this how you install a guide area on all pages except for the home page.

1. Select "your Name" > Setup on any page. From the displayed page, select App Setup > Customize > Home > Home Page Layouts. Both of these are indicated in the following figure.

| salesforce | earch Leads, C | contacts, A So | earch Barry Kingsbury 🔻 | Cloud Extend | | | |
|------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-------------------------------|--|--|--|
| Home Getting Started Guid | e Designer | Guides 🕂 | My Profile Setup | | | | |
| Expand All Collapse All | Case F | Page Layou | Developer Console Logout | | | | |
| Force.com Home | This page allows you to create different page layouts to display Case data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default. | | | | | | |
| System Overview | Case Pag | e Layouts | New Page Layout Assig | nment | | | |
| Personal Setup | Action | Page Layout Name | Created By | Modified By | | | |
| My Personal Information | Edit Del | Case Layout | Bob Demo, 7/25/2011 8:33 AM | Barry Kingsbury | | | |
| Email Import Desktop Integration | Case Clos | se Page Layouts | New Page Layout Assig | nment | | | |
| ▶ My Chatter Settings | Action | Page Layout Name | Created By | Modified By | | | |
| App Setup | Edit Del | Case Complete Layout | <u>Barry Kingsbury,</u> 8/21/2012 1 PM | :25 <u>Barry Kingsl</u> PM | | | |
| Customize | Edit Del | M <u>Bob Demo,</u> | | | | | |
| ▶ Home | | | | | | | |
| ► Forecasts (Customizable) | | man fr | | | | | |
| Cases | | | | | | | |
| Fields | | | | | | | |
| Contact Roles Page Layouts |) | | | | | | |
| Field Sets Search Layouts | | | | | | | |
| Assignment Rules | | | | | | | |
| | | and a second sec | | | | | |

2. Select Visualforce Pages. Within the area on the right, drag Section to the place where you want the guide to appear.

| Close Case Layout v | <u>Mini Pac</u> | <u>e Layout Mini Console View</u> <u>V</u> | ideo Tutorial Help for this Page 🤫 |
|------------------------------------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------|------------------------------------|
| Save 🔻 Quick Save Previ | ew As 🔻 Cancel 🛷 Uno | lo 🔿 Redo 🛛 📰 Layout Pro | perties |
| Fields Buttons Visualforce Pages Related Lists Case Sample | Q Quick Find Page Name Section Case Handle Case Case Sales Guides | e Sales Guides | |
| Case Detail | | Standard Buttons | |
| | Edit Delete | Close Case Clone Sharing | |
| Case Information (Head | | Close Case Clone Sharing | |
| Case Information (Head | | Close Case Clone Sharing | 1-415-555-1212 |
| | er visible on edit only) | | |
| Case Owner | er visible on edit only) Sample User | Contact Phone | 1-415-555-1212 |
| Case Owner 🔒 Case Number | er visible on edit only) Sample User GEN-2004-001234 | Contact Phone | 1-415-555-1212 |

3. Set the section's attributes by filling in the displayed dialog.

| Section Properties | × |
|----------------------------------------|-------------------------|
| Section Name Guides | |
| Display Section Header On 🛛 🔽 Detail P | age |
| 🔽 Edit Pag | je |
| Layout | Tab-key Order |
| | |
| 💿 1-Column 🔘 2-Column | 💿 Left-Right 🔘 Top-Down |
| ок | Cancel |

4. Drag the guide to this newly created Guides area.

| Close Case Layout - | <u>Mini Paqe</u> | ≥Laγout Mini Console View ⊻ | /ideo Tutorial Help for this Page 🧭 |
|--------------------------------|---------------------------|-------------------------------|-------------------------------------|
| Save V Quick Save Prev | iew As 🔻 Cancel 🦃 Und | o 🐴 Redo 📔 🖪 Layout Pro | perties |
| Fields | Quick Find Page Name | * | |
| Buttons | → Section Cas | e Sales Guides 🔪 | |
| Visualforce Pages | * Blank Space | | |
| Related Lists | Case Handle Case | | |
| | Case Sales Guides | \ | |
| | | | |
| | | | |
| | | | |
| Case Sample | | | |
| | | | |
| Case Detail | S | tandard Buttons | Custom Buttons |
| | Edit Delete C | lose Case Clone Sharing | |
| | | | |
| Case Information (Head | ler visible on edit only) | | |
| Case Owner | Sample User | 🚊 Contact Phone | 1-415-555-1212 |
| 🔒 Case Number | GEN-2004-001234 | 🔒 Contact Email | sarah.sample@company.com |
| Contact Name | Sample Contact | | _ |
| 🔒 Account Name | Sample Account | | |
| | | | |
| Guides | | | |
| | Case Sales Guides 🖌 | | |
| Additional Information | | | |
| \star 🔍 Status | Sample Status | Туре | Sample Type |
| \star 🍳 Case Origin | Sample Case Origin | Case Reason | Sample Case Reason |
| Priority | Sample Priority | | |

5. Save your changes and you're done. This *guides area* will now appear on all Case pages.

| Case Inf | formation (Head | er visible on edit only) | | |
|----------|------------------------------|--------------------------|-----------------|-----------------------------------|
| | Case Owner | <u>Sample User</u> | 🚊 Contact Phone | 1-415-555-1212 |
| | Case Number | GEN-2004-001234 | 🚊 Contact Email | sarah.sample@company.co |
| • | Contact Name | Sample Contact | | |
| | Account Name | Sample Account | | |
| Guides | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | va Case | Sales Guides | |
| | | vr Case | Sales Guides | |
| | | vr Case | Sales Guides | |
| | | vr Case | Sales Guides | |
| | | vr Case | Sales Guides | |
| | | vr Case | Sales Guides | |
| | | v Case | Sales Guides | |
| Addition | val Information | vr Case | Sales Guides | |
| Addition | al Information ★ ● Status | Ve Case | Sales Guides | Sample Type |
| Addition | | | | Sample Type Sample Case Reason |

Implementing Service Steps and Search Services

This topic describes how to create service steps and search services from Salesforce Apex classes.

Note: You can download an archive file that contains a sample automated step and a sample search service.

Creating an Apex-based Service Call Step

You can create new Service Call step services using an Apex Class that implements the IAeAutomatedStepService interface.

IAeAutomatedStepService Interface

To create the new services, you first implement two interface methods:

- describe()
- invoke()

describe()

Returns AeServiceDescription, which contains metadata for services.xml.

invoke()

Invoked at runtime.

For example:

Service Discovery with Apex Automated Steps

When you synchronize your Salesforce organization, Apex services are discovered based on their class name. If a class name starts with "icrtStep", it is recognized as a Service step (an "Apex automated step"). For example, the Apex class named "icrtStep_EchoService" is a service.

Process objects or object lists are serialized to a JSON payload format, similar to the process object input or output in other processes. They are sent to Apex where the System. JSON class in Apex can parse the JSON.

To return a process object, define the outputs as either 'reference' or 'objectlist' and serialize the objects to JSON so Process Designer converts them back to a process object.

For example, for output parameters:

```
global AeServiceDescription.AeServiceParameterDesc
    output = sDescription.addOutputParameterDesc('objOutput', 'reference');
    output.addParameterOption('referenceTo','Account');
```

Service Interface

Apex services must implement two methods:

- describe()
- invoke()

describe()

Provides information discovered for use by the cloud service.

Returns an instance of AeServiceDescription, which has the following fields:

| Field | Description |
|----------------------|----------------------------------------------------------------------------------|
| serviceType | Type of service , either a service step or a search. |
| namespaceQualifier | Organization-specific namespace. |
| name | Service class name. |
| displayName | Name displayed to the user. |
| description | Text describing the service. |
| inputParameter (0n) | List of input parameter descriptions. (AeServiceDescription.AeParameterDesc) |
| outputParameter (0n) | List of output parameter descriptions. (AeServiceDescription.AeParameterDesc) |

invoke()

Implements the runtime behavior of the service.

| Parameter | Description |
|----------------|--------------------------------------------------------|
| objectId | ID of the Applies To object from the host's context. |
| objectType | Type of the Applies To object from the host's context. |
| parameter (0n) | List of AeServiceParameter name/value pairs. |

Takes an instance of AeServiceRequest as input.

Returns AeServiceResponse, which has the following fields:

| Field | Description |
|------------------------|--------------------------------------------------------------------------------------------------------------------------|
| parameter (0n) | List of AeServiceParameter name/value pairs. |
| errorInfo.AeErrorInfo | Conveys error information. Use this to relay error information instead of throwing an uncaught fault within your service |
| errorInfo.errorMessage | Error message. |
| errorInfo.invalidData | Field-level error details. |

Custom Search Services

You can implement search services as Apex classes. Search services use the same interface and discovery mechanisms as step services, with the following differences:

- Set the service type to search in AeServiceDescription: AeServiceDescription.serviceType = 'search';
- There should be one output parameter, Search Results, that returns the data.
- To return a valuelist, the invoke() method should return name/value pairs representing the name/id of the
 objects returned.

The following example returns a valuelist of account references filtered by Ownerld:

```
List<Account> accountList =
  [SELECT Name, id FROM Account WHERE OwnerId =:userRef LIMIT 20];
  for (Account account: accountList)
   {
     // For a search service, return name/id as parameters
     response.addParameter(account.Name, account.Id);
}
```

Republish the Salesforce Connection

To make custom automated step and search services visible, you need to republish the Salesforce connection from Application Integration.

Note: You need to republish the Salesforce connection only when you make a change to the class interface, not when you make a change to the class.

CHAPTER 5

Mobile Guides

This chapter includes the following topics:

- Mobile Guides Overview, 58
- Smart Phone Setup, 59
- Contacts on Your Cell Phone, 59
- Smart Phone Calendar Entry, 61

Mobile Guides Overview

The procedures you use when you create guides that run on smart phones are identical to those you use when you create guides that run on a PC or a Mac.

However, the smaller screen affects your design in the following ways:

- Mobile forms typically have just a few fields, with more steps, due to the limited display area.
- The order of fields in a mobile guide is critical because of the limited number of visible items at any one time.
- Use of images is more limited due to size constraints.
- Guides are often launched from URLs that are provided to or are created by your users.
- Keep in mind that users will use the phone's voice processing software.
- Typing is less convenient on a mobile device. Where possible, let the user choose data from lists or checkboxes.
- You can design a guide with the Run On setting as Desktop/Tablet and change the setting to Smart Phone when the design is complete.
- If you need a guide to run on both a mobile phone and on a larger device, you can do much of the work in embedded steps, to make it easier for use on both device types.
- Guide Designer requires that all guides, even embedded guides, have a Run on setting. However, at
 runtime, it uses the Run on value set for the embedding task and ignores the Run on setting in the
 embedded guide..
- Depending on the type of phone and operating system, users may have limited abilities to format text.

You can run a guide in your Android phone or iPhone, using the phone's browser.

Note: Guides display and run only on the device type selected for the guide (Smart Phone or Desktop/Tablet).

Smart Phone Setup

This topic explains how guide users can install an icon that launches a guide in the phone's browser.

Using Wizards on an iPhone

On an iPhone, users must:

- 1. Enable cookies for Guide Designer. If they are not set, go to iPhone Settings and set **Safari > Accept Cookies** to **Always**.
- 2. Open Safari and login to Salesforce. In most cases, just go to http://login.salesforce.com/.
- 3. After logging in, select the *Home* tab if it isn't already selected. Although it may be small, you will see the Guide Designer Wizards area.
- 4. Tap the **New Window** button in the Guide Designer Wizards area. A list of guides appears in its own window, making it much easier to read.
- 5. Tap the iPhone icon that lets you bookmark the page or add it to the Home Screen.

Using Wizards on an Android Phone

On an Android phone, users must:

- 1. Open their browser and login to Salesforce. In most cases, just go to http://login.salesforce.com/END.
- 2. After logging in, select the *Home* tab if it isn't already selected. Although it may be small, you will see the Guide Designer Wizards area.
- 3. Tap the **New Window** button in the Guide Designer Wizards area. A list of guides appears in its own window, making it much easier to read.
- 4. Touch the star at the right of the URL bar, perhaps edit the page's name, tap **Bookmarks** or a folder in the **Add To** menu, and then tap **OK**.

For more information, see documentation at the Google support site.

Contacts on Your Cell Phone

The mobile phone setup wizard adds a vCard button to your Contact pages.



Pressing this button tells Salesforce to create a **vCard** file (it has a .vcf extension), and sent it to your browser. For most browsers, click on the file's name to add a contact to your personal contacts.

- Firefox: The name is in its Download dialog.
- Chrome: The name is at the bottom within the window's frame.
- Internet Explorer: You can run it from the displayed dialog box.

After it loads, you can see it in your contact manager. Here, for example, is the contact within Microsoft Outlook. Notice the Web page address link:

| 💵 🛛 🖓 🍽 🔶 🧇 🖃 🖛 Howard Jones - Contact | | | | | | | | |
|----------------------------------------|---------------------------------------------------------------|--------------------------------------------|--|--|--|--|--|--|
| File Contact Insert Format Text Review | | | | | | | | |
| Save & Ne Save & Delete Close | | E-mail Meeting More * Communicate | | | | | | |
| | | | | | | | | |
| Full Name H | oward Jones | | | | | | | |
| Company: G | ilobal Media | | | | | | | |
| Job title: B | uyer | Guide Web | | | | | | |
| File as: Jo | es, Howard 🗸 page | | | | | | | |
| Internet | | address | | | | | | |
| 🔛 E-mail 💌 <u>m</u> i | ichael.rowley@activevos.com | | | | | | | |
| Display as: H | Howard Jones (michael.rowley@activevos.com) | | | | | | | |
| Web page address: h | https://ce4sf20-001.na12.visual.force.com/apex/AeGuideList?ot | | | | | | | |
| IM address: | | | | | | | | |
| Phone numbers | | | | | | | | |
| Business 🔹 [2 | 12) 555-5555 | and the second | | | | | | |

This link also appears in this contact on your smart phone after it syncs with your contact manager, which is the left phone in the next figure. Clicking on the link opens your phone's browser and it displays the guides that you can use for this contact. You can now click on a guide's link to open the guide's first step. If there is only one guide, this guide displays.

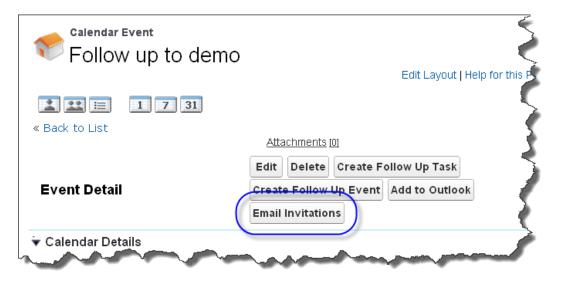


Note: Only mobile guides are displayed when you use this link. Guides that were designed for display in your PC's browser are not shown. Similarly, clicking on this link while using a contact manager such as Outlook when you are using a PC or a Mac tells Guide Designer that it should only display non-mobile guides.

Smart Phone Calendar Entry

When smart phone support was added to Guide Designer, the setup wizard added an **Email Invitations** button to Salesforce Calendar Event pages.

Note: This button only appears on the page that Salesforce displays when it shows you information about already created events. It does not appear on the page containing the form that you use to create the event.



After you select this button, the wizard displays a wizard that creates iCal files. After the completing the wizard, Guide Designer sends mail to the people you've identified. For many, it will attach an iCal file. It actually sends two different iCal files. The first places the event on a calendar after it is executes. It also has a link to the guide that the event's host will use. The second sends iCal files to the people attending the event and who are identified in your Salesforce objects. This iCal file just places the event on a calendar. It also has any text that you added. If the person is not identified in your Salesforce objects, the wizard just sends the text you entered.

| Instructions |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A calendar invitation will be sent to Barry Kingsbury (the event owner), which includes a link to a wizard to run after the meeting. |
| Do you also want to send an invitation to Barry Kingsbury? ○ No ⊙ Yes |
| Do you also want to send an invitation to the other invited participants for this event (including a link to the event page in Salesforce)? ● No ● Yes |
| Provide email addresses for any additional recipients of the invitation, separated by semicolons: |
| barryk@onbsotonharbor.com |
| Subject: Follow up to demo |
| Body: |
| B ℤ Ü Ξ Ξ 潭 潭 ∞ 炎 墬 ") (* 国 マ |
| |
| To go over what you think about the product and find out if you're having any problems |
| a provide a present of the second |
| |
| Email Invitation For Event |
| Continue |

After making choices in this step and perhaps adding additional recipients, click the **Continue** button to send invitations. The wizard attaches an iCalendar ics file to the email. When the recipient clicks on it within the received email, the event is added to the recipient's calendar. The event owner receives a slightly different email as it also has a link to the guide navigator. Here is a Microsoft Outlook example containing the link:

| 🔲 🖬 🤊 🛛 | ŭ 🍲 👻 ⊽ Follow up to demo - Appointment 🖂 I | | | | | | | | 23 | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|---------|----------------------------------------|-------|---------------------|----------|-----------|-----------------------------------------|------|---|----------|---|---|
| File | Appointment Insert Format Text Review | | | | | | ۵ | 0 | | | | | |
| Save & Delet | □ te → | | oppointment | , | Invite Attendees | Options | ₹ Tags | Zoom | | | | | |
| Action | IS | | Show | | Attendees | | | Zoom | | | | | |
| Subject: | Follow | up to c | lemo | | | | | | | | | | |
| Location: | Web Co | nferen | ce | | | | | | | | | | - |
| Start time: | e: Fri 6/29/2012 • 10:00 AM • All day event | | | | | | | | | | | | |
| End time: | Fri 6/29/ | 2012 | | • 10: | 30 AM | . | | | | | | | |
| View Guide: < <u>https://c.na12.visual.force.com/a`pex/AeGuideList?</u> <u>objectId=00UU0000002qAcNMAU&objectType=Event</u> >. To go over what you think about the product and find out if you're having any problems | | | | | | | | | | | | | |
| ~~~~~ | ····· | | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | | ~~~ | | ~~~ | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | ~~~~ | ~ | \smile | - | |

On an iPhone, you will receive the Event data shown in the left screen in the next figure. After tapping this link, the wizard sends the first step to your phone, which is shown in the right screen.



Importing iCal files on Android Phones

Android phones, by default, do not support iCal ics files. Instead, Android relies on apps that you can download into your app using Google Play. Informatica does not validate or test any of these apps. Our advice with regard to choosing an app is to choose one with many downloads. Also, it is possible that some apps do not work with the Android version that you are using.

In testing apps, attachments within gmail were usually opened without needing support from another app.

In most cases, the app works by recognizing the ics file type used by iCal files. When you click on an iCal email attachment from another app, you are usually asked if you want to download or preview the attachment. One of the options should be the name of the app you installed that is associated with iCal files. You should also see a checkbox that lets you set this app as the default action. If you have more than one calendar app on your phone, you will need to choose which calendar the iCal app will use. Finally, some apps import the iCal file and leave the calendar entry in an open state so that you can view and modify it. It is not saved unless you explicitly save it. Other apps just save it and you will have to open it separately. Others save it and leave it open.

CHAPTER 6

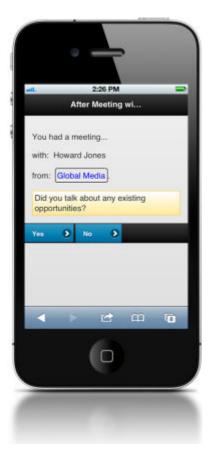
Meeting Follow-up Wizards

This chapter includes the following topics:

- Meeting Follow-up Wizards Overview, 66
- After Meeting Wizard, 68
- Running a Wizard from the Contact Page, 71

Meeting Follow-up Wizards Overview

The meeting follow-up wizards, built with Guide Designer for Salesforce, accelerate and automate many routine tasks that are performed after meetings. These include recording notes, creating contacts, and assigning follow-on tasks. The Guide Designer wizards add additional integration between Salesforce and your smart phone.



After the wizards are installed within your Salesforce pages, you are ready to run them. Two of the wizards run from within your mobile phone. The third runs from a Salesforce page.

Running Wizards on your Smart Phone

Two of the follow-up wizard discussions present guides that run on mobile phone. A Guide Designer Wizard is not an app; that is, you do not have to download something from iTunes or Google Play. Instead, the wizards are web applications that run in your smart phone's browser.

As you will see, running a wizard on your smart phone lets you add information about a contact, opportunity, lead, or any other of your Salesforce objects much closer to the time when you met with or talked to someone. You do not have to start your laptop and perhaps find a Wi-Fi hotspot. Instead, you can interact with Salesforce using a wizard that helps you enter information and does it in a way that fits into the small size of your smart phone's screen.

When wizards are defined, they are defined in a way that makes each step (that is, each screen) appear in a way best suited for your phone. If your site has created wizards, you can go display just your wizards. These wizards usually let you create new objects. For example, a guide could help you create a new lead.

When you login into Salesforce, it displays your Salesforce home page. If you scroll down, you will see a Guide Designer Wizards section. This section contains the wizards that you can execute from your home page. Directly underneath the list of Wizards, you will find a New Window button. Tapping on this button displays the wizards on their own page. You may want save that page as an icon on your phone's home screen.

Contact Wizards

After talking with a contact, you can update Salesforce in two ways. If you are using Salesforce on a PC or Mac, use the Sales Call Follow-up wizard to enter new tasks, notes, contacts, and opportunities. You can also

set follow-up tasks for yourself and others. To run this wizard, go to the contact's page in Salesforce and select this guide from the Guides section. (The Guides section was added to your contact pages when your administrator installed the wizards.) For more information, see <u>"Running a Wizard from the Contact Page" on page 71</u>. If you are using a smart phone, you can use the "After Meeting Wizard" on page 68.

The Mobile Phone Setup Wizard added a **vCard** button to your Salesforce contact pages. After pressing this button, the Guide Designer wizard creates a **vCard** file that your browser can download. Opening this file adds a contact to your contact manager (for example, Microsoft Outlook). It will also add a link that, when clicked, displays the guides that you can use for this contact. For more information, see <u>"Contacts on Your Cell</u> Phone" on page 59.

Smart Phone Calendar Entry

The Mobile Phone Setup Wizard add an **Email Invitations** button to your Salesforce Calendar Event pages. After pressing this button, a wizard displays a page for customizing an invitation and perhaps sending it to more people. The invitation contains an iCalendar file, which when the recipient clicks on it, adds the event to the recipient's calendar.

For more information, see "Smart Phone Calendar Entry" on page 61.

After Meeting Wizard

The After Meeting Wizard lets you accelerate and automate many of the routine tasks that are performed after meetings. It lets you update existing opportunity information and add new ones after talking to a contact. It also lets you add new contacts, notes, and create follow-up tasks.

Select a heading to see the different operations that the Wizard guides you through.

Identify Contact and Update Opportunities

Step 1

If the guide did not start with a known contact, who did you contact?



Step 2

If the meeting was associated with an opportunity, then update the stage, amount, close date and next step for the opportunity. Also add meeting notes which will be added to the activity history for this opportunity.

Note: When entering text such as notes, it is far easier to use your smart phone's voice recording capabilities if it has them.

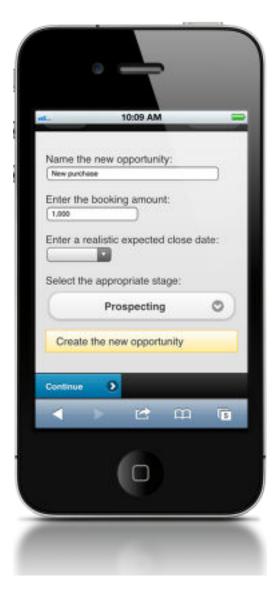
Step 3

Provide (or update) the role that this contact plays in this opportunity (e.g., business user or decision maker).

Additional or New Opportunities

Step 4

The wizard then presents a list of all other opportunities for this account. Select any that were discussed in this meeting. The wizard then walks through each selected opportunity and allows you to update them.



Step 5

Add any new opportunities that were discussed, providing key fields for each.

New Contacts

Step 6

Create contacts for any people from the meeting that were not already contacts.

Follow-Up Tasks

Step 7

Create a follow-up task for yourself.



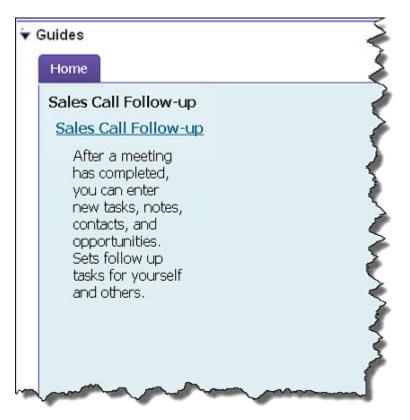
Step 8

Create follow-up tasks for other people.

Done!

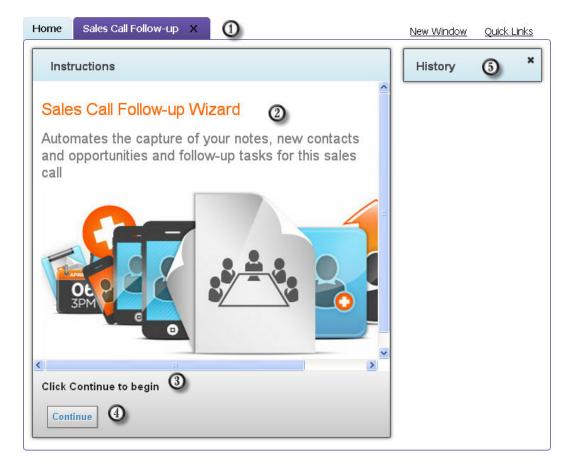
Running a Wizard from the Contact Page

After your administrator installs the meeting wizards, all of your contacts will have a **Guides** area. This area contains the "Sales Call Follow-up Wizard." This wizard only displays when you are using a PC or a Mac.



Click on the "Sales Call Follow-up" link to start the wizard. The first step within the wizard displays. (All screens within the wizard are called "steps".) The table following this figure explains what is within this first step.

The way information is presented from step-to-step may differ slightly; however, all are similar.



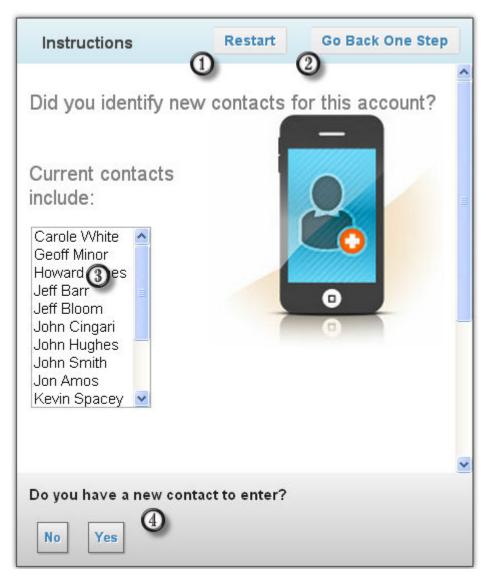
| 1 | A tab for your wizard and others wizards that you are using. |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | The step's main area. This area can contain instructions, information, areas into which you will be able to type text, select check boxes, and so on. The step shown here only has text as it describes what the wizard does. |
| 3 | A prompt area. This text tells you which button to press so to select the step that the wizard next executes. This step has only one button. |
| 4 | Pressing a button in this area tells the wizard what the next step will be. In many cases, a step has more buttons than are shown here. Each button tells the wizard what the next step will be. For example, a step that asks a question might have Yes and No buttons, and the step that follows depends upon which you select. |
| 6 | The history of the steps you've executed. A new item is added after you press a button within the prompt area. Each step in the history is actually a link. Clicking on it reverts the wizard back to a previously executed step. This also undoes any of the changes made to Salesforce since the step you're going back to executed. This could, for example, delete a lead that another step created. |
| | Note that you can close the history window to make more room for the main wizard window by clicking on the "x". |

In this example, press the Continue button after you've read the step's text. The wizard now displays the following step.

| lome | Sales Call Follow-up X | | | New Window Quick Links |
|----------------|--------------------------------------------|-------------------|--------------|---------------------------------------------------------|
| Instr | ructions ① | Restart Go | Back One Ste | ep History × |
| | h of the existing oppo ou talk about? ② | ortunities of Glo | obal Media | Kep Answer Click Continue Continue Continue |
| 0 | Name | Amount | Close Date | |
| G | ilobal Media - Cloud Extend f | Purchase 9500.0 | 11/16/2012 | |
| C C | ompany-new sale | 10000.0 | 05/03/2012 | |
| G | ilobal Media - quickstart cons | sulting 999.0 | 05/16/2012 | |
| Update Cont | e existing opportunities inue | | | |

| 1 | The "Instructions" label is in all steps. |
|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | A question. Most steps begin with a question or instructions. A form into which you'll enter information usually follows. |
| 3 | Here, the wizard displays all of the opportunities with this company. The wizard uses the contact's company name to locate and display this Opportunity information. |

After advancing a few steps, the wizard can display:



This figure contains two new elements added to the step. Also, two others are slightly different.

| 1 | The Restart button tells the wizard to return to its first step. Unlike using the history to go back to the first step, clicking restarts will not undo any of the changes made by the wizard (such as deleting objects). |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 | While you can return the wizard to any of its previously executed steps by clicking on the step in the History list, it is often more convenient to press the Go Back One Step button if all you want to do is return back to the step just executed. |
| 3 | This table, automatically generated by Guide Designer, contains a list of your contacts for this account. |
| 4 | Unlike the two previous steps shown in this topic, this step contains two buttons. Other steps can contain more (or perhaps many more). |

CHAPTER 7

Controlling Who Sees Guides

This chapter includes the following topics:

- Controlling Who Sees Guides Overview, 76
- Filtering Using Tags, 77
- Enabling Guide Designer-Related Classes for New Profiles, 78
- Associating Guide Designer Apex Classes With a User Profile, 83
- Show Guide Only When, 87
- Creating an Object that isn't Available by Default, 88

Controlling Who Sees Guides Overview

Two ways exist for you to control which of your users can see guide navigator areas on Salesforce pages. The most common is to uses page layouts that are assigned to user profiles. If you need more granularity than this method provides, you can use permission sets. A permission set allows you to assign an object to a set, then assign that permission to selected users. (For more information on permission sets, see Permission Set Overview in the Salesforce documentation.)

Using permission sets, all users in a profile will still see a page layout that has a section for guides. However, only users associated with the "Guide User" permission set will actually see the guide navigator. Other users that open the "Guides" section of their page will see a message something like:

```
Content cannot be displayed: You do not have sufficient privileges to access the page: /apex/ce4sf20_001__AeCaseSalesGuides"
```

Using permission sets is a three-step process.

- Go to the Visualforce page for guides and change their security setting so not users are allowed. Do this
 here because Visualforce pages for guides are typically named "objectName Sales Guides". Now, no one
 is able to see the guide navigator.
- Create a permission set called "Guide User". In this permission set, click on "Visualforce Page Access" and give access to all of the CE Visualforce pages.
- 3. Go to the users that should have access to Guide Designer and associate them with that permission set.

Now, only these users will see the guide navigator.

Filtering Using Tags

3.

When you define a guide's properties, you specify the object to which the guide applies and all users who have access to the object can see the related guides.

You can set conditions under which guides appear by Using the **Tags** area on the **Guide Properties** dialog. For example, if you might want to display a certain guide only for leads with an "Open - Not Contacted" status. In this case, you first create a tag for the guide that is used as a display filter. In addition to the built-in capability filters for some object fields, you can then customize guides to apply these tags.

Note: You can also simply set Guide Properties to determine where guides display. For details, see <u>"Show</u> Guide Only When" on page 87.

To filter from the Visualforce page, use this approach:

- 1. From the Salesforce Setup menu, select App Setup > Develop > Pages.
- 2. Select the Visualforce Markup tab:

| Salesforce1 Setup | Page Detail | | | Where is this used? Preview |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|----------------------------|---------------------------------|-------------------------------------------|
| Force.com Home | | Label | Opportunity Sales Guides | |
| | | Namespace Prefix | icrt | |
| System Overview | Require C SRF | protection on GET requests | | |
| Personal Setup | | Last Modified By | Chris Keller, 6/30/2015 1:18 PM | |
| My Personal Information | | | | |
| Email | Package Information | | | |
| Import | | Installed Package | Informatica Cloud Real Time for | Salesforce |
| Desktop Integration My Chatter Settings | (m. m. m.) | N | | |
| My Connected Data | Visualforce Markup | Version Settings | | |
| Work.com | <pre> <apex:page_stand< pre=""></apex:page_stand<></pre> | ardController="Opportu | nitv"> | |
| | | | unity" objectId="{!Opportun | ity.Id}" extraInfo="{!JSENCOD |
| App Setup | | | match="Role={!JSENCODE(SU | <pre>BSTITUTE(\$UserRole.Name, ",",</pre> |
| Customize | | | | |
| Create | | | | |
| | | | | |
| | | | | Where is this used? Preview |
| | | | | |
| Develop | | | | |
| Develop Apex Classes | | | | |
| Develop Apex Classes Apex Triggers | | | | |
| Develop Apex Classes Apex Triggers Apex Test Execution API Components | | | | |
| Develop Apex Classes Apex Triggers Apex Test Execution API Components Custom Permissions | | | | |
| Develop Apex Classes Apex Triggers Apex Test Execution API Components | | | | |

4. Add a filter to this page to create a tag, using the guidelines below. For example, a guide could filter by account types, account industries, or user roles.

Guidelines

Suppose you want users with different roles to see and be able run different sets of guides for Opportunities. To do so, simply create a tag like Role=CEO on your guide. Since the Opportunity object type is already set up to filter based on role, this guide will now only appear if the user's role is CEO.

The equals sign (=) determines how the guide use the tag's contents for matching. The guide will be displayed only if the object matches all of the guide's tags.

Notice this condition in the Visualforce page definition:

```
match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))}
```

When the Opportunity page loads, because *QUserRole.Name* is a match (in this case, match="Role=CEO", the guide displays. (You can ignore the JSENCODE and SUBSTITUTE functions.)

If a guide does not have a tag with an equal sign, it is always shown, you can define match criteria to excludes a specific value, or hide a guide by setting a match definition will never occur, for example, Role=foo.

In the Account page definition (AeAccountSalesGuide), there are three possible matches. Using the same kind of logic, you could create a guide that matches on any of the fields that are on the page:

```
<apex:page standardController="Account">
        <c:AeSalesGuides objectType="Account" bjectId="{!Account.Id}"
        extraInfo="{!JSENCODE(Account.Name)}"
        match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))},
        Type={!JSENCODE(SUBSTITUTE(Account.Type, ",", ""))},
        Industry={!JSENCODE(SUBSTITUTE(Account.Industry, ",", ""))}"/>
        </apex:page>
```

Enabling Guide Designer-Related Classes for New Profiles

This topic presents a set of operations that let you enable Guide Designer-related classes for new profiles within Salesforce and then enable the Guide Designer Apex-related classes and the Visual Force pages for the profile.

As an example, this topic shows how you launch a guide with Chatter Only License.

1. From the list of User Profiles (located within **Setup > Administration Setup > Manage Users > Profile**), click the link of the Chatter Only User. (Do not select Edit.)

| Q Quick Find | | Profiles | | | | |
|---------------------------------------------|------------|---------------------------------------------------------------------|--|--|--|--|
| Force.com Home | Below is a | Below is a list of the profiles for your organization. You can view | | | | |
| System Overview | Profile | | | | | |
| System Overview | Action | Name | | | | |
| Personal Setup | Edit Del | <u>3333</u> | | | | |
| My Personal Information | Edit | Chatter External User | | | | |
| Email | Edit Del | Chatter External User Cloned | | | | |
| Import | Edit | Chatter Free User | | | | |
| Desktop Integration | Edit | Chatter Moderator User | | | | |
| My Chatter Settings | Edit Del | Chatter Only Cloned | | | | |
| | Edit | Chatter Only User | | | | |
| App Setup | Edit | Content Only User | | | | |
| Customize | Edit | Contract Manager | | | | |
| Create Develop | Edit | Customer Portal Manager | | | | |
| Develop Deploy | Edit | Customer Portal Manager Custom | | | | |
| Schema Builder | Edit | Customer Portal Manager Standard | | | | |
| Canvas App Previewer | Edit | Customer Portal User | | | | |
| Installed Packages | Edit | Force.com - One App User | | | | |
| AppExchange Marketplace Critical Updates | Edit | Gold Partner User | | | | |
| Chircal Opulaes | Edit | High Volume Customer Portal User | | | | |
| Administration Setup | Edit | Knowledge Only User | | | | |
| Manage Users | Edit | Marketing User | | | | |
| Users | | My Portal User | | | | |
| Mass Email Users | | Read Only | | | | |
| Roles | Edit | | | | | |
| Permission Sets | Edit | Siteforce Only User | | | | |
| Profiles | Edit | Solution Manager | | | | |
| Public Groups | Edit | Standard Platform User | | | | |

2. Click the **Clone** button, specify a profile name, and then click **Save**.

| Profile Chatter Only User « Back to List: Users | | 4 |
|-------------------------------------------------------|--------------------------------|--------------------------------------------------------------------|
| Users with this profile have the permissions | and page layouts listed below | v. Administrators can change a user's profile by editing that user |
| If your organization uses Record Types, use | the Edit links in the Record 1 | Type Settings section below to make one or more record types a |
| | | Login IP Ranges (0) Enabled Apex Class Access (12) Enabled |
| Profile Detail | | Edit Clone View Users |
| Name | Chatter Only User | |
| User License | Chatter Only | |
| Created By | Bob Test, 8/17/2012 7:18 AM | 8 |

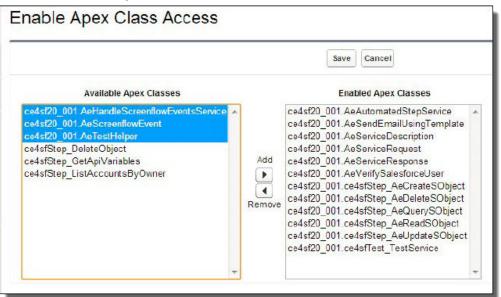
3. Click the link for **Enabled Apex Class Access**, click **Edit** and select all classes starting with "ce4sf20_001 from the Available Apex Classes and add them to Enabled Apex Class. Click **Save**.

| Back to List: Users | | | |
|----------------------------------------------|---------------------------|--------------------------------------------------------------------------------------------------|------------------------------------------|
| Jsers with this profile have the permissions | and page layouts listed l | below. Administrators can change a user's profile by e | diting that user's personal information. |
| your organization uses Record Types, use | the Edit links in the Rec | ord Type Settings section below to make one or more Looin IP Ranges (0) Enabled Apex Class Acces | |
| Profile Detail | | Edit Cione Delete View Users | |
| Name | TestChatterProfile | | |
| User License | Chatter Only | | Custom Profile |
| Description | | | |
| Created By | Uma Ashok, 8/29/2013 | 12:05 PM | Modified By |
| Console Settings | | | |
| Console Layout | [Edit] | | |
| Page Layouts | | | |

4. Click the link for Enabled Visual force Page Access, click Edit.

| | | Save | Cancel |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Available Apex Classes | | Enat | oled Apex Classes |
| ce4sf20_001 AeHandleScreenflowEventsService ce4sf20_001.AeScreenflowEvent ce4sf20_001.AoTostHelpor ce4sfStep_DeleteObject ce4sfStep_GetApiVariables ce4sfStep_ListAccountsByOwner | Add ce Remove ce ce ce ce ce ce ce ce ce ce | 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.ce4 4sf20_001.ce4 4sf20_001.ce4 4sf20_001.ce4 | AutomatedStepService SendEmailUsingTemplate ServiceDescription ServiceResponse VerifySalesforceUser IsfStep_AeCreateSObject IsfStep_AeDeleteSObject IsfStep_AeQuerySObject IsfStep_AeQuerySObject IsfStep_AeUpdateSObject IsfStep_AeUpdateSObject |

5. Select all pages starting with "ce4sf20_001" from the Available Visual force Pages and add them to Enabled Visual force Pages and click **Save**.



6. Edit the profile, navigate to Custom Object Permissions, and set the Access rights for the custom objects for Read, Create, Edit, Delete as appropriate. Refer to the following snapshot below for an example. Your choices will be what is required for your organization. Click the **Save** button located at the bottom of the page.

| | Basic Acce | 855 | | | Data Administ | tration |
|--------------------|------------|------------|------|--------|---------------|--------------|
| | Read | Create | Edit | Delete | View All | Modify All i |
| account999 | | | | | | |
| Ad Groups | | | | | | |
| Google Campaigns | | | | | | |
| Guides | | | | | | |
| Guide Executions | | | | | | [[[]] |
| Guide Milestones | | | V | | | 1 |
| Invoice Statements | | | | | | |
| Keywords | | | | | | (FT) |

7. Go to App Setup > Customize > Home Page Layouts, click Page Layout Assignment and select a Home Page Layout for the newly created cloned Chatter User Profile. Below is an example.

| Customer Portal Manager Standard | Home Page Default | |
|----------------------------------|-----------------------------|---|
| Customer Portal User | Home Page Default | - |
| Force.com - One App User | Home Page Default | • |
| Gold Partner User | Home Page Default | |
| Guest License User | Home Page Default | - |
| High Volume Customer Portal User | Home Page Default | - |
| Knowledge Only User | Home Page Default | • |
| Marketing User | Dashboard Home Page Default | |
| My Portal User | Home Page Default | |
| Read Only | Dashboard Home Page Default | |
| Siteforce Only User | Home Page Default | - |
| Solution Manager | Dashboard Home Page Default | - |
| Standard Platform User | Home Page Default | - |
| Standard User | Dashboard Home Page Default | |
| System Administrator | Dashboard Home Page Default | - |
| TestChatterProfile | Dashboard Home Page Default | • |

8. Edit the Home Page Layout selected in the previous step and make sure that the Guide Designer Wizards checkbox is selected, click **Next**, then **Save**.

| choose the components to include on your | home page layout. | |
|------------------------------------------|-------------------------|---|
| Layout Name | Dashboard Home Page D | |
| Select Wide Components to Show | | |
| Items to Approve | Calendar | 1 |
| Tasks | Dashboard Snapshot | 1 |
| Cloud Extend Wizards | CustomGuide | |
| Projetech | | |
| Select Narrow Components to Show | | |
| Portal Sidebar Search | Create New | 1 |
| Portal Document Search | Recent Items | 1 |
| Portal Solution Search | Messages & Alerts | 1 |
| Portal Product Search | Custom Links | 1 |
| Tags | Customer Portal Welcome | E |

More Information

Chatter only licenses are also known as Chatter Plus. They are designed for Unlimited, Enterprise, and Professional Edition users that do not have Salesforce licenses but need access to some Salesforce objects

in addition to Chatter. These users can access standard Chatter people, profiles, groups, and files, plus they can:

- View Salesforce accounts and contacts.
- Use Salesforce CRM Content, Ideas, and Answers.
- Modify up to ten custom objects.

Associating Guide Designer Apex Classes With a User Profile

This topic shows how to create a profile and associate Guide Designer-related Apex classes to it. The procedure that you will read allows guides to run with Salesforce Chatter Only licenses.

1. Select Setup > Administration Setup > Manage Users > Profile.

| salesforce | | | | | | | |
|-----------------------------------------------------|----------|--------------|---------------------------------------------|----------------------------------------|-----------------------------------------|--------------|-----------|
| Home Campaigns Leads | Accounts | Contac | s Opportunities | Forecasts | Contracts | Cases | Solut |
| Expand All Colla | U | | rofiles st of the profiles for yo | ur organization | . You can view | more detaile | ed inform |
| Force.com Home | P | Profile | | | New | | \neg |
| System Overview | | Action | Name | | | | U |
| Personal Setup My Personal Information Email Imp | | Edit Edit | Authenticated Website Chatter External User | | | | A o |
| | | Edit | Chatter Free User | | | | C |
| | | Edit | Chatter Moderator User | | | h | - ad |
| m mm | - | ، سر ر | - marine r | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | ~~~ | <u> </u> |
| Administration Setup | <u></u> | Edit | Marketing User | \sim \sim | | _ | s |
| Manage Users | 1 | Edit | Partner App Subscription | 1 | | | Pa |
| Users | | Edit | Partner User | | | | |
| Mass Email Users | | Edit | Read Only | | | | 5 |
| Roles | | Edit | Service Cloud | | | | े |
| Permission Sets | | Edit | <u>Silver Partner User</u> | | | | ्रे |
| Profiles | | Edit | Solution Manager | | | | Se |
| Public Groups | | Edit | Standard Platform User | | | | |
| Queues Login History | | Edit | Standard User | | المرسع معادمات | | s |

2. Select a User Profile. Here "Chatter Only User" will be selected.

| Profile | |
|------------|--------------------------------|
| Action | Name |
| Edit Del | <u>aaaa</u> |
| Edit | Chatter External User |
| Edit Del | Chatter External User Cloned |
| Edit | Chatter Free User |
| Edit | Chatter Moderator User |
| Edit Del | Chatter Only Cloned |
| Edit 🤇 | Chatter Only User |
| Edit | Content Only User |
| Edit | Contract Manager |
| Edit | Customer Portal Manager |
| Edit | Customer Portal Manager Custom |

3. On the displayed page, click the **Clone** button.

| Chatter Only Us | ser | | |
|----------------------------|---------------|----------------------------|-----------------------------------------------------|
| Users with this profile ha | ve the permis | sions and page layou | ts listed below. Administrators can change a user a |
| If your organization uses | Record Type: | s, use the Edit links in t | the Record Type Settings section below to make on |
| | | | Login IP Ranges |
| Profile Detail | | | Edit Clone Delete View Users |
| | Name | Chatter Only User | <u>لم</u> |
| U | ser License | Chatter Free | mmmmmm |

4. On the displayed page, give the profile a name; for example, "TestChatterProfile" and then click **Save**.

| Clone Profile | |
|-------------------------------------|-------------------------------------------------|
| Enter the name of the new profile. | 3 |
| You must select an existing profile | to clone from. |
| Existing Profile | Chatter Only User |
| User License Profile Name | Force.com - App Subscription TestChatterProfile |
| | |
| | Save Cancel |

5. Salesforce displays a Profile page for the profile you just created. On that page, press **Enabled Apex Class Access**.

| Profile Chatter Only User | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Users with this profile have the permissions and page lay | routs listed below. Administrators can change a user's profile by editing that user's personal |
| If your organization uses Record Types, use the Edit links | in the Record Type Settings section below to make one or more record types available to us |
| | Login IP Ranges [0] Enabled Apex Class Access [0] Enabled Visualforce Page Access [0] |
| Profile Detail | Edit Clone Delete View Users |
| Land and the second sec | have a second second second second |

Salesforce scrolls this page and displays this area. The area may already have some classes enabled or, as in this example, none are yet enabled.

| Login Hours | Edit |
|------------------------------------------------------------------------|-----------|
| No login hours specified | \$ |
| | |
| Login IP Ranges | New |
| No login IP ranges specified. Users from any IP address are allowed to | b log in. |
| Enabled Apex Class Access | Edit |
| No Apex Classes enabled | |
| Enabled Visualforce Page Access | Edit |
| No Visualforce Pages enabled | · ······ |

Click the Edit button.

 Within the Available Apex Classes area on the left, select all of the classes starting with "ce4sf20_001" and press the Add button. This name may be different in some releases. However, they will always begin with "ce4sf". 7.

| | Save Cancel |
|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Available Apex Classes | Enabled Apex Classes |
| ce4sf20_001.AeHandleScreenflowEventsService ce4sf20_001.AeScreenflowEvent co4sf20_001.AoTostHolper | ce4sf20_001.AeAutomatedStepService ce4sf20_001.AeSendEmailUsingTemplate ce4sf20_001.AeServiceDescription |
| ce4sfStep_DeleteObject ce4sfStep_GetApiVariables ce4sfStep_ListAccountsByOwner | Add Add Ce4sf20_001.AeServiceResponse ce4sf20_001.AeServiceResponse ce4sf20_001.AeVarifySalesforceUser ce4sf20_001.ce4sfStep_AeCreateSObject ce4sf20_001.ce4sfStep_AeDeleteSObject ce4sf20_001.ce4sfStep_AeQuorySObject ce4sf20_001.ce4sfStep_AeReadSObject |

8. Scroll the profile window up until you see the Custom Object Permissions area. Set the access rights for the custom objects for Read, Create, Edit, or Delete as appropriate. Here is an example:

| | Basic Acce | 85 | | | Data Administ | tration |
|--------------------|------------|-----------|------|--------|---------------|----------|
| | Read | Create | Edit | Delete | View All | Modify A |
| account999 | | | | | | |
| Ad Groups | | | V | V | | 1 |
| Google Campaigns | | | | | | [77] |
| Guides | | | V | V | | |
| Guide Executions | | | | | | |
| Guide Milestones | | | | V | | |
| Invoice Statements | | | | | | [FT] |
| Keywords | | | | | | [FT] |

- 9. Click the **Save** button located at the bottom of the page.
- 10. Go to App Setup > Customize > Home > Home Page Layouts, and click the Page Layout Assignment

| • | Home Page Layouts | | | | | | |
|---|---------------------------------------------------------------------------|------------|------------------------------------|-------------------------|--|--|--|
| | This page allows you to create different tab layouts for the Home Tab. | | | | | | |
| | A B C D E F G H I J K L M N O P Q R S | | | | | | |
| | | | Page Layout Assignm | nent | | | |
| | Action | Name 🕈 | Created By | Last Modified By | | | |
| | Edit Del | DE Default | Barry Kingsbury, 6/10/2013 9:54 AM | <u>Barry Kingsbury,</u> | | | |

- 12. Select a home page layout for the newly created profile; in this example, it is "TestChatterProfile." Click **Save**.
- 13. Edit the home page layout selected in the previous step and make sure that the "Guide Designer Wizards" checkbox is selected. Click **Next**, then click **Save**.

| Edit Home Lay | out | |
|-------------------------|------------------------------------|-----------|
| Step 1. Select the comp | onents to show | 2 |
| Choose the components | to include on your home page layou | t 👌 |
| Layout Name | DE Default | ş |
| Select Wide Componen | ts to Show | l l |
| Items to Approve | | } |
| Tasks | | Dashboard |
| Cloud Extend Wizards | | |

Show Guide Only When

Note: This feature only applies to guides that execute within Salesforce.

You can determine which guides display within the "Guides" area on a user's Salesforce page by entering criteria in the guide properties. Enter the criteria in the **Show Guide Only When** field on the Guide Properties **Advanced** tab.

The criteria must be entered as a Boolean expression. You can use the functions and operators described in the Salesforce documentation. See the examples below.

Use the Insert Field list to select insert objects and fields into the expression.

This expression can be as complex as you need. For example, here is an expression that tells Guide Designer that it should only display a guide when an account's owner is one of three people:

```
CONTAINS($Account.Owner.Name, "John Smith")
|| CONTAINS($Account.Owner.Name, "Bob Smith")
|| CONTAINS($Account.Owner.Name, "Jim Smith")
```

Note: Do not use Salesforce field syntax (enclosing field names in curly braces with the "!" prefix) when you enter field names. The expression is passed directly to Salesforce as an Apex expression. If you pass an invalid Apex expression, Salesforce returns an error message.

Example 1

If the field is a list, you can use an equals sign to select one of the items from the list. For example:

Account.Type = 'Analyst'

Example 2

To define multiple criteria, use "&&" (logical AND) and "||" (logical OR) in your expression. For example:

```
(Account.Type = 'Analyst' && Account.testfield_c= true) || (Account.Phone = '1234')
```

In this case, the expression means that:

- 1. The account type must be Analyst AND the testfield must be true, OR
- 2. The account phone number must be 1234.

In this case, the parentheses group the first two tests so they are evaluated as a single unit.

In the following example, the parentheses cause this expression to be evaluated differently:

```
(Account.Type = 'Analyst') && (Account.testfield_c= true || Account.Phone ='1234')
```

Here, the same criteria means that:

- 1. The account type must be Analyst AND
- 2. Either the testfield must be true OR the account phone must be 1234.

Creating an Object that isn't Available by Default

Guide Designer knows about many of the objects you use in Salesforce. There are others that Guide Designer doesn't automatically know about. In addition, your site may have custom objects. You can add these objects

to Guide Designer using the following procedure. In this example, Contact Roles for an Opportunity are being added.

1. Go to Guide Designer Setup by pressing the "+" icon. Here's an example:

| Home Getting Started Guide Desig | ner Guides 🕂 |
|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| Create New | All Tabs |
| Recent Items | Use the links below to quickly navig te to a tab. Alternatively, you |
| Process new case Test Guide Visibility | View: All Tabs |
| Test Guide Visibility Bob Test Opportuntity (Test Price Book) | Accounts Tell me more! |
| Acme - 1,200 Widgets Many Knuth | Of Account Scout |
| 00001098 | Peans Beans |
| Barry Kingsbury | Campaigns Tell me more! |
| Barry Kingsbury A David Drucker | Cases Tell me more! |
| | Chatter |
| 🔯 Recycle Bin | Cloud Extend Setup |
| | man man man |

2. Click Setup.

Here's what you should see:

| Home | Getting Started | Guide Designer | Guides | + | | |
|----------------|------------------------|-------------------|-------------|---------------------|-----------|-----------|
| | | | | | | |
| Synch Syste | nronize Cloud Ext m | tend with Your | | | | 3 |
| - | nchronization Sta | | emo-org.com | on 02/25/2013 at 16 | i:43:03 | 5 |
| • (| Guides can run in | the following obj | ects | | | -> |
| + (| Guides can create | the following obj | jects | | | \supset |
| Syn | chronize Reset Cha | inges | J | | Mar Janan | > |

3. Expand the *Guides can create the following objects* section and press the **Add** button to create a new object:

| Name | Display Name | Description | Fields for Selected Object Shown for |
|------------------------|---------------------------------|-------------|--------------------------------------|
| Case | | | Create |
| FeedItem | Create Chatter | | Name |
| Note | | | Lead ID |
| Event | | | Deleted |
| Task | | | Master Record ID |
| | | | ☑ Last Name* |
| Account | | | First Name |
| Contact | | | Salutation |
| Order_c | | | Rating |
| OpportunityContactRole | Create Opportunity Contact Role | | Annual Revenue |
| | | | Employees |
| Add Remove | | | |
| | | | |
| hronize Reset Changes | | | |
| | | | |

As you are typing "OpportunityContactRole", Salesforce displays a list from which you can select objects that are set up in Salesforce. After the name is entered, you will see the object's field on the right. Notice that required fields are checked automatically. If you want other fields to be displayed by default in the Guide Designer when doing a "Create Opportunity Contact Role", you can add them by checking their name.

4. After this object is defined, press the **Synchronize** button.

If after you synchronize, you do not see this object, try refreshing or restarting your browser.

CHAPTER 8

Launching a Guide

This chapter includes the following topics:

- Launching a Guide Overview, 91
- Launching Guides from a Home Page, 91
- Launching a Guide from a Salesforce Button, 92
- Launching Guides from a Calendar Event, 94
- Launching Guides from a Phone Contact, 97

Launching a Guide Overview

You can launch a guide from Application Integration or from Salesforce.

If you want to launch a guide from Salesforce, you must perform the following prerequisite tasks in Application Integration:

- Create a guide and select a Salesforce object in the Start > Applies To property. The guide gets associated with the object that you select.
- 2. Validate, save, and publish the guide.

Note: If you log in to Salesforce and do not see your guides, log out of Salesforce, clear the browser cache, and then log in to Salesforce.

You can launch the guide from the Salesforce home page or from a Salesforce button. You can also create a calendar event or a vCard in the Guide Designer, to launch a guide from your smart phone.

Launching Guides from a Home Page

When users log into Salesforce, they are logging into their Home page. This is a natural place from which they can launch many guides. Any guide, however, that is launched from a Home page does not have a context; that is, the guide does not apply to any object. (If it applied to the object, it would appear on the object's page.) Consequently, home page guides are often used to create Salesforce objects.

To place a guide on the user's home page, set the **Applies To** field within the **Guide Properties** dialog to **Home**.

| Guide Properties | | ~ |
|-----------------------|-----------------------------|------------------|
| General P | ossible Outcome | s Guide Fields |
| Name: | Initial Lead Qua | lification 🧳 |
| Applies To: | Lead 🗸 | 1 |
| Description: Tags: | Event Home | omma to start ne |
| Run On: | Lead Note Opportunity | • 5 |
| | Product Task | ~ |

Launching a Guide from a Salesforce Button

The previous topics in this section showed how you can add a button to a page and have that button launch a guide. In some cases, you want a guide to launch when a user presses a button. For example, within an Account page, pressing the "New Opportunity" button tells Salesforce to display an empty Opportunity page. This topic shows how you could instead launch a guide when the user presses the button.

Step 1: Create a Visual Force Page

- Select Setup > App Setup > Develop > Pages. At the top of the table that is displayed, press the New button.
- 2. Enter the label that will be used for your code. Salesforce will also automatically give it a name. You can give it another name if you like.
- 3. Add your code to this form. The following code is designed to modify the Salesforce built-in Opportunity object. It will invoke a guide called "New Opportunity". As it will be invoked from within an Account page, the objectType is set to Account. The opportunity will need to know the AccountId (which is the same as when the form is displayed when pressing the New button). The final attribute indicates the guide will display in an area whose height is 600 pixels.

| Sualiorce | Page | |
|-----------------------------------------------|-------------------------------------------------------|------------------------------|
| age Edit | Save Quick Save Car | mcel Where is this used? Cor |
| Page Information | | |
| | Label ReplaceOpptNewButtd lame ReplaceOpptNewButtd | |
| isualforce Markup | Version Settings | and the second second |
| | Version Settings | |
| 1 <apex:p< td=""><td></td><td></td></apex:p<> | | |

Step 2: Reassign the "New" Button

- 1. Select Setup > Customize > Opportunities > Buttons, Links, and Actions.
- 2. In the displayed table, select the **Edit** Action to the left of New.

| Buttons, | Links, and Actions | New Action Ne | w Button or Link | Default Custom Links | S |
|------------|--------------------|---------------|------------------|----------------------|----------------------------------------------|
| Action | Label | Name | Description | Туре | Content Source |
| Edit | Add to Campaign | AddInfluence | | | Standard Salesforce.com Page |
| Edit | Clone | Clone | | | Standard Salesforce.com Page |
| Edit | Delete | Delete | | | Standard Salesforce.com Page |
| Edit | Edit | Edit | | | Standard Salesforce.com Page |
| Edit | List | List | | | Standard Salesforce.com Page |
| Edit | New | New | | | ReplaceOpptNewButton (Visualforce Page) |
| Edit 😽 | Opportunities Tab | Tab | | | Standard Salesforce.com Page |
| Edit Del | Process Apps | CE_Test | | Custom Visualforce | aeOpportunityGuideMobileEnabled (Visualforce |

3. In the displayed Override Properties page, go to the bottom of the form and set Visualforce Page. From the picklist, select the name of the Visualforce page This is the name you set in the previous section.

| Override Pro | operties | Save Cancel |
|--------------------------|----------------------------------------------------------------|-------------|
| Label Name Default | New New Standard Salesforce. | |
| Override With Comment | No Override (use Visualforce Page | |
| | | |
| | | Save Cancel |

4. Press the Save button.

Step 3: Test that the Guide is Launched

- 1. Open a page for an existing account.
- 2. Scroll down the Opportunities area, then press **New Opportunity**. The New Opportunity guide should launch.

Launching Guides from a Calendar Event

Guide Designer lets you to send iCalendar files to people who will be attending an event. When it was installed, Guide Designer added an **Email Invitations** button onto Calendar Event pages that helps you do this.

Here's how you send iCalendar files to meeting participants.

- 1. Create an event in Salesforce. Generally, creating an event is separate from sending invitations, although it doesn't have to be. As you usually do when creating an event, you will identify the person the event is assigned to, the object such as an opportunity that the event is related to, and so on.
- 2. After creating the event, go to the created event's page. Here you will see an Email Invitations button.

| Follow up to demo | Ş |
|---------------------------|-----------------------------------|
| | Edit Layout Help for this 🛃 |
| # # 1 7 31 « Back to List | 5 |
| | Attachments [0] |
| Event Detail | Edit Delete Create Follow Up Task |
| | Email Invitations |
| ✓ Calendar Details | ason many more thank |

3. Press this button to display a wizard.

image href="../images/EmailInvitations.png"

| Instructions | Restart |
|--------------------------------------------------------------------------------------------------------------------------------------------|------------|
| | |
| A calendar invitation will be sent to Barry Kingsbury (the event owner), which includes a link to a wizard to run after the meeting. | 31 |
| Do you also want to send an invitation to the other invited participants for this event (including a link to the event page i Salesforce)? | n |
| Provide email addresses for any additional recipients of the in separated by semicolons: | nvitation, |
| | |
| Subject: Follow up to demo | |
| Body: | |
| B I ∐ ☵ ☵ 非 非 ∞ ※ 또 ળ ♥ 💷 マ | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Email Invitation For Event | |
| Continue | |

- 4. After filling out this page, click the **Continue** button. Guide Designer will now create an iCalendar file for the event, attaching it to an email that it sends to people participating in the event. **Note**: Guide Designer can create two different iCalendar files. The first is included in emails sent to people who are named as contacts, leads, and the like. This iCalendar file lets them add the event to their calendar. In contrast, the person sending the invitation receives an email that contains a link to the event. Also, if the invitees include other users who are working for your company, they also get a link to the Event object. This lets them get more information about the event. However, only the event's host (the one to which the event is assigned) can run the event.
- 5. Open the calendar attachment on your phone. (If you open it on a PC, you will need to sync it to your phone). Here is the kind of information that the person who is hosting the meeting sees on an iPhone.



6. At the time of the meeting, users can tap the link to access the guide.

Launching Guides from a Phone Contact

When Guide Designer is installed, it added a **vCard** button onto Contact pages. After pushing this button, Guide Designer creates a vCard file that you can use to add this person to a contact list. When you are in your contact manager, the information displayed when you open the contact contains a link that when tapped displays the guides that a user can run for this contact.

Here how you do this:

1. Click the **vCard** button on a Contact page.



2. After you press this button, your browser receives a **vCard** file. Execute this file to have it be installed in Outlook or another contact manager. If you do this on a PC or Mac, your contact manager must sync with the contact information on your smart phone. Here is what a contact page looks like on an iPhone:



3. Notice the link in the home page area. Tapping this link displays the guides that you can run for this contact. If there is only one guide, Guide Designer displays that guide.

CHAPTER 9

Guide Execution Reports

This chapter includes the following topics:

- Guide Execution Reports Overview, 100
- Using the Guides Tab, 100
- Creating Salesforce Reports, 102

Guide Execution Reports Overview

This chapter describes how to view guide execution history from the Guides tab and use the Salesforce Reports feature to run a report on Guide Executions.

Using the Guides Tab

To view guide execution history from the Guides tab:

 Locate the Guides tab in the Salesforce menu. You may need to click the + sign and choose it from the list of options. The following page opens:

| Home | Chatte | er Files | Leads | Accounts | Contacts | Opportunities | Reports | Dashboards | Products | + | • | |
|------|-----------|-------------|-------------|-------------|----------|-----------------------|---------------|-------------------|---------------|-------|-------|-----|
| V | All 🔻 | Create New | / View | | | | | | | | - | 0 |
| New | Guide | Change Own | er 🗘 | A | B C D E | F G H I J K | L M N O | P Q R S T | U V W X | Y Z | Other | AII |
| A | ction | Name 🛧 | | | | | | | | | | |
| E | dit Del | NetSuite De | mo Guide | | | | | | | | | - |
| E | dit Del | New Case S | Set Up | | | | | | | | | |
| E | dit Del | new home o | quide | | | | | | | | | |
| E | dit Del | Package Tra | acking | | | | | | | | | |
| E | dit Del | Process Inv | oice | | | | | | | | | |
| E | dit Del | Request Sp | ecialist | | | | | | | | | |
| E | dit Del | Resolve Ca | se | | | | | | | | | |
| E | dit Del | Select Acco | unt for Nev | Opportunity | | | | | | | | - |
| | | | | | | | | | | | | F |

Note: The Salesforce controls on this page apply only to the list. You must open Guide Designer to use the guide design features.

2. Click on the guide you want to view to see the execution details, as shown in this image:

| | | | | | | Customize Page Edit | Layout Printable ' | View Help for this Page |
|------------------------------------------------------------------------------|-------------------------------------------------------------------|----------------------------------|---------------------|------------------------|----------------------------------------|----------------------------------------|----------------------|---------------------------|
| Back to | List: Guides | | | | | | | |
| | | Guide | Executions [5] Oper | n Activities [0] A | ctivity History [0] Guide Tran | islation [0] | | |
| Guide [| Detail | E | dit Delete Clone |] | | | | |
| | Name | NetSuite Demo Guide | | | Sta | tus Published | | |
| | Applies To | Home | | | Last Publis | ned 6/30/2015 1:28 PN | 1 | |
| | Guide Design | Open | | | Ow | ner 🙂 Chris Keller [C | hange] | |
| | Created By | Chris Keller, 6/30/2015 1:2 | 8 PM | | Last Modified | By Chris Keller, 6/30/ | 2015 1:28 PM | |
| | | E | dit Delete Clone |] | | | | |
| | recutions | N | w Guide Execution | | | | | Guide Executions Help |
| Juide E | | | | Status | Start Time | End Time | Outcome | Running Guide |
| | Name | Run On | Run On Type | Status | | | | |
| Action | Name NetSuite Demo Guide | Run On Kellie Delaney | Run On Type User | Completed | 10/2/2015 9:11 AM | 10/2/2015 9:11 AM | | |
| Action Edit Del | | | | | 10/2/2015 9:11 AM 10/2/2015 9:11 AM | 10/2/2015 9:11 AM 10/2/2015 9:11 AM | | |
| Action Edit Del Edit Del | NetSuite Demo Guide | Kellie Delaney | User | Completed | | | | |
| Action Edit Del Edit Del Edit Del Edit Del Edit Del | NetSuite Demo Guide NetSuite Demo Guide NetSuite Demo Guide | Kellie Delaney Kellie Delaney | User User | Completed Completed | 10/2/2015 9:11 AM | 10/2/2015 9:11 AM | | |

From this page, you can:

- Click Guide Design in the header to open the guide in Guide Designer.
- Click the guide name in the list to display a Salesforce detail page for the selected guide.
- Click the name in the **Run On** column to see information about the user account that run the guide.
- Click Open in the Running Guide column if the guide is still executing and view the guide in progress.

Guide Details

If you click Name in the Guide Executions list, the following details page displays:

| Guide Execution | emo Guide | | A |
|------------------------|-----------------------------------|---------------------|-----------------------------------------------------|
| « Back to List: Guides | | Customize Page | Edit Layout Printable View Help for this Page 🧐 |
| | G | uide Milestones [0] | |
| Guide Execution De | Edit Delete Clo | ne Execution Log | |
| Name | NetSuite Demo Guide | Guide | NetSuite Demo Guide |
| Run On | Kellie Delaney | Starting User | Kellie Delaney |
| Run On Type | User | Start Time | 10/2/2015 9:11 AM |
| Status | Completed | Ending User | Kellie Delaney |
| Running Guide | | End Time | 10/2/2015 9:11 AM |
| Outcome | | Owner | Kellie Delaney [Change] |
| Created By | Kellie Delaney, 10/2/2015 9:11 AM | Last Modified By | Kellie Delaney, 10/2/2015 9:30 AM |
| | Edit Delete Clo | ne Execution Log | |
| Guide Milestones | New Guide Milestone | • | Guide Milestones Help 🥐 |
| No records to display | | | |

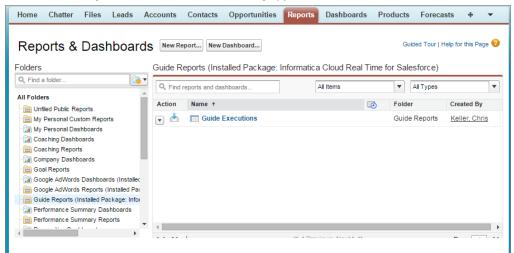
Several options are available to manage the execution reporting history. For example, you can:

- Click **Delete** if you no longer need this history. However, note that if you delete the guide history from this page, you must republish the guide in Guide Designer before it is available for execution.
- If the guide includes milestones, click Milestone to display a detail page for the milestone.
- Click **Execution Log** to log in to Informatica Cloud[®] and review the guide execution log in the Application Integration Console.

Creating Salesforce Reports

To use the Salesforce Reports feature to run a report on Guide Executions:

- 1. Choose the **Reports** tab in Salesforce (or click the + sign to locate it).
- 2. Choose **Guide Reports** from the list. The following appears:



3. Click **Guide Executions** to run the report and view options to change report parameters. Use the Salesforce commands on this page in the same way you would use them on other report pages.

| 종 Guide Exe | cutions | | | | | | |
|----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|------------------------------------------------------------|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|---------|-----------------------------------|
| Report Generation Status: | Complete | | | | | | |
| Report Options: | | ime Frame — | | | | | |
| | how | ate Field Last Published | ▼ Curre From 4/1/2 | ent FQ To | ▼ 13 | | |
| | | | | | | | |
| Run Report Hide De | tails Customize Sa | | Delete | Printable View | Export Details | Outcome | Running Guide |
| | | Run On Type Opportunity | Status Completed | Start Time + 6/28/2013 8:08 AM | | Outcome | Running Guide |
| Name | Run On | Run On Type | Status | Start Time 🔸 | End Time | | Running Guide |
| Name Add Products to Opportunity | Run On Replaciong Broken Parts | Run On Type Opportunity | Status Completed | Start Time ↓ 6/28/2013 8:08 AM | End Time 6/28/2013 8:11 AM | - | Running Guide - - |
| Name Add Products to Opportunity Add Products to Opportunity | Run On Replaciong Broken Parts Replaciong Broken Parts | Run On Type Opportunity Opportunity | Status Completed Completed | Start Time + 6/28/2013 8:08 AM 6/28/2013 8:07 AM | End Time 6/28/2013 8:11 AM 6/28/2013 8:08 AM | - | Running Guide - - - |
| Name Add Products to Opportunity Add Products to Opportunity Add Products to Opportunity | Run On Replaciong Broken Parts Replaciong Broken Parts Replaciong Broken Parts | Run On Type Opportunity Opportunity Opportunity | Status Completed Completed Completed | Start Time + 6/28/2013 8:08 AM 6/28/2013 8:07 AM 6/28/2013 8:07 AM | End Time 6/28/2013 8:11 AM 6/28/2013 8:08 AM 6/28/2013 8:07 AM | | Running Guide - - - - |
| Name Add Products to Opportunity Add Products to Opportunity Add Products to Opportunity Add Products to Opportunity | Run On Replaciong Broken Parts Replaciong Broken Parts Replaciong Broken Parts Replaciong Broken Parts | Run On Type Opportunity Opportunity Opportunity Opportunity | Status Completed Completed Completed Completed | Start Time + 6/28/2013 8:08 AM 6/28/2013 8:07 AM 6/28/2013 8:07 AM 6/28/2013 8:02 AM | End Time 6/28/2013 8:11 AM 6/28/2013 8:08 AM 6/28/2013 8:07 AM 6/28/2013 8:07 AM | | Running Guide |